

User Guide

Legacy[®] 9.0

Family Tree

For Microsoft® Windows®7 or higher

(to use the Mapping feature in Legacy
you have to have Internet Explorer 8.0 or
higher installed.)

Millennia Corporation

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Introduction to Legacy

Installing Legacy and Learning the Basics

Welcome to Legacy, the premier program for working with your family history. In this introduction you will find the following information: How to install Legacy and what to do when it opens on your screen; what the options are on the ribbon bar and toolbars; what the different views (Legacy Home, Family, Pedigree, Descendant, Chronology, and Index) show; and what you can do in the views.

Installing Legacy

New Users

Installing from the Web:

It is recommended that you download Legacy from our website on the Internet. This ensures that you are getting the latest update of the program. Even if you have been sent a physical CD-ROM with the Legacy installation program on it, we still suggest that if at all possible, you should download the latest version.

The latest update of Legacy is always available at:

<http://LegacyFamilyTree.com/DownloadLegacy.asp>

From this web page, you can download Legacy by choosing either **Download Legacy 9.0 Standard Edition** or **Download Legacy 9.0 Deluxe Edition**. The two choices actually take you to the same place to start the download by first asking for your email address and name. You are also asked to indicate that you are not a robot by checking a box. After doing so, click the **Next Step ->>** button. Legacy will immediately send you an email with the download link included. Just click the link to display the download page and click on the **Click Here to Download** button. Depending on what browser you are using, it will generally tell you or ask you where to download the installation file. After it is downloaded, all you have to do is start the program (often just by clicking or double-clicking the filename shown at the bottom of your browser window – or by double-clicking the filename wherever you downloaded it to. After doing so, just follow the prompts. After Legacy is installed, it will automatically start. If it is the first time you have installed version 9, it will take you through a startup wizard where you can choose some basic settings and enter your Deluxe customer number if you have one.

Installing from the CD-ROM

If you don't have Internet access, you can initially install Legacy from your CD-ROM.

- Insert the Legacy CD-ROM into your CD-ROM drive. The Setup procedure begins automatically. If it does not start automatically, click the Windows **Start** button and choose **Run**. In the **Open** box type: **e:LegacySetup.exe** (substitute the drive letter for your CD-ROM drive if it is different than e:) and then click **OK** to start the installation program.
- Follow the prompts, being sure to enter your name and customer ID number when asked.

At the conclusion of the installation, Legacy will be located in its own folder in the Programs Files on the C drive (or another drive, if you changed the default). You can

start Legacy from the icon  on the computer desktop, or choose:
Start > All Programs > Legacy 9.0

Legacy 8 Users

If you are upgrading to version 9 from version 8, you are probably doing so through our website. Simply follow the installation steps in the email you were sent, or use the **New Users > Installing from the Web** instructions above. Or you can use the **Installing from the CD-ROM** instructions above if you don't have Internet access.

Pre-Legacy 8 Users

If you are upgrading to version 9 from a version older than version 8, no problem. Just follow the same instructions above.

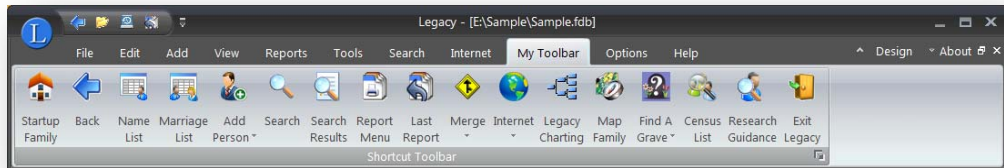
Starting Legacy

We recommend that you watch the **Getting Started with Legacy** video before you start to use Legacy for the first time. There is a link on our home page.

When you start version 9 of Legacy for the first time, you will be taken through a **Startup Wizard**. Part of this process is to set some basic options and to also enter your customer number, if you have one, that will unlock all the Deluxe Edition features in the program – so be sure you have your customer number handy.


When Legacy Begins

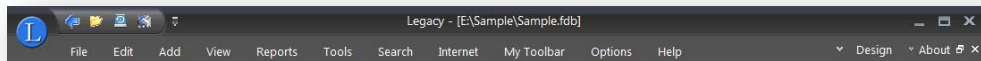
The Ribbon Bar



The Ribbon is designed to help you quickly find the commands that you need to complete a task. Commands are organized in logical groups, which are collected together under tabs. Each tab relates to a type of activity, such as chart appearance or publishing.



Minimizing the Ribbon

To minimize the Ribbon, click on the minimize button  in the upper right corner of the ribbon. (You can also right-click on any option and then choose Minimize the Ribbon).



The Ribbon remains minimized with only the tabs showing. When you click on a tab, the Ribbon temporarily opens and shows the options associated with that tab. After selecting an option, the Ribbon closes back up again, only showing the tab headings. (Another way to quickly minimize the Ribbon is to double-click the caption on any of the tabs.)

Maximizing the Ribbon

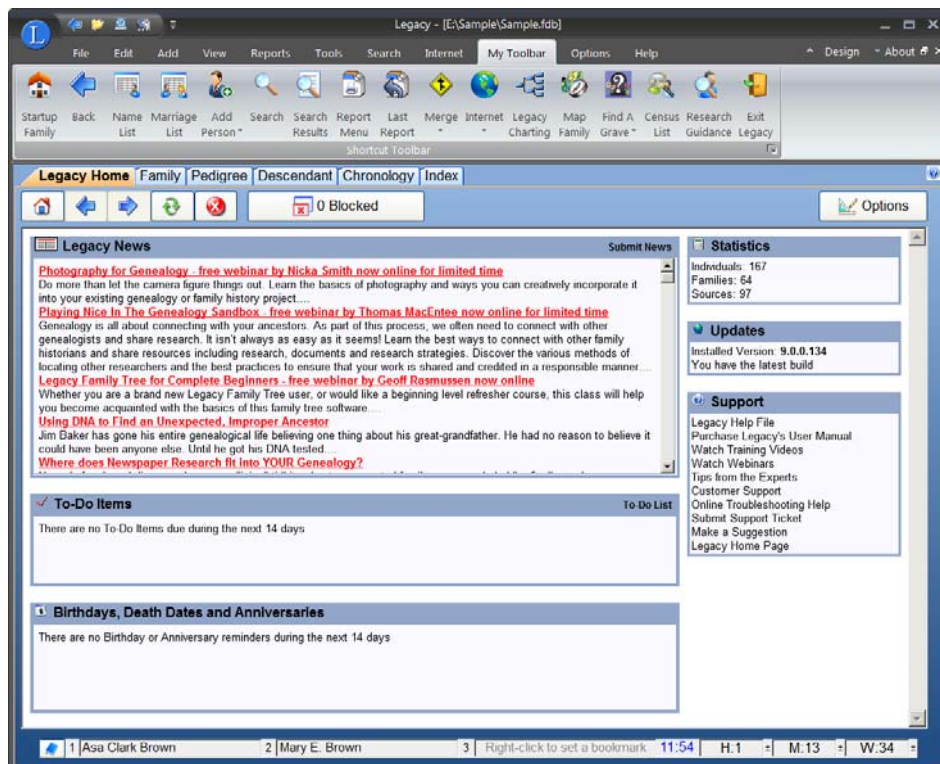
To maximize the Ribbon back to its original size, click the maximize button  in the upper-right corner of the ribbon. (You can also click **Customize Quick Access Toolbar**  and then click **Minimize the Ribbon** in the list (which unchecks the option - which restores the ribbon), or, double-click any tab again to restore the Ribbon.)



(For a complete description of how to use the Ribbon bar and what each tool does, see the Help index: **Ribbon > Overview**)

Legacy Home

The **Legacy Home** tab on the main screen of Legacy brings you important information about your family file and also gives you a global view into the world of genealogy.



Legacy News

The Legacy News box brings you articles and announcements about genealogy-related subjects. The contents of this box are changed often so be sure to check back on a regular basis to see what is new. Most of the articles and announcements contain only a summary of their content but each title is a link to complete information about the subject. (An Internet connection is required.)

If you have an article or announcement that you would like to submit for inclusion in the newsletter, click the **Submit News** link to the right side of the *Legacy News* box header.

To-Do Items

You can select the to-do tasks that you would like to be reminded of. These reminders are displayed on the day you specify in the to-do item itself and remain visible until you either reschedule or cancel the reminder.

To edit a to-do item in the list, click anywhere on the task. To display the full list of to-do items, click the **To-Do List** link to the right side of the *To-Do Items* box header. [To-Do List](#)

Birthdays and Anniversaries

You will never forget the birthdays or anniversaries of your family members again. Just tell Legacy what to be reminded of and it will automatically be displayed in this list. You can even set the number of days in advance of the event to begin displaying it. You can even be reminded of death dates if you wish.

To select an individual or marriage to include in the list, put a checkmark in the **Birthday Reminder** and or **Death Date Reminder** box on the *Individual Information* screen or the **Anniversary Reminder** box on the *Marriage Information* screen.

To edit an individual or marriage in the list, click anywhere on the desired entry.

Statistics

This box shows you how many individuals, families and sources are currently in your family file. You can also click the [Statistics](#) title itself which is a link to display the *General Information* screen which displays many more statistics about your family file.

Updates

The current Legacy version is displayed. If a newer version is available, it is also shown along with a **Download Now!** link that you can use to download the newest update.

Support

The *Support* box gives you easy access to a variety of technical support options as well as training material, bug reporting and a way to submit suggestions to make Legacy even better. Just click on the appropriate link. (All of the options here require you to be connected to the Internet.)

Navigation

The **Legacy Home** tab has a built-in browser that lets you view Internet content without ever leaving Legacy. As you click the various links in the boxes, the

navigation buttons in the upper-left corner can be used to return to the original

Legacy Home tab contents , move **Back**  and **Forward** , **Refresh** the current page , or **Stop** the loading of a new page .

Options

Clicking the **Options** button in the upper-right corner of the **Legacy Home** tab displays a popup menu with the following options:

Options - Displays the **Legacy Home Options** screen where you can indicate your Internet connection method and specify how many days in advance you want to be reminded of To-Do items, birthdays, and anniversaries.

Zoom - Lets you specify the font size to use in the browser window.

Check the Internet Now - Checks the Internet (if you are connected) to refresh the *News and Updates* sections of the **Legacy Home** tab.

Family View

The *Family View* window displays information about both a husband and a wife along with their marriage information, their children, and their parents. Navigation within this window is very easy and logical.

The screenshot shows the Legacy software interface in the Family View. The window title is "Legacy - [E:\Sample\Sample.fdb]". The menu bar includes File, Edit, Add, View, Reports, Tools, Search, Internet, My Toolbar, Options, and Help. The toolbar contains icons for various functions. The main content area is divided into several sections:

- Parents:** Nathan Brown [54] (1755/1765-)+ and Molly Clark [53] (1765-)+.
- Husband:** Asa Clark Brown [1] (11 Oct 1792, Woodstock, Windham, Connecticut, United States).
- Wife:** Eleanor Huffman [34] (11 Jan 1803, Kingson, Frontenac, Ontario, Canada).
- Marriage:** 8 Mar 1832 - Tionesta, Venango, Pennsylvania, United States.
- Children:** A list of 12 children, including Joshua Marsden Brown [76] (1833-1), Samuel Brown [75] (1835-), Reverend William C. Brown [74] (?), John W. Brown [73] (1843-1885), David Clark Brown [92] (1846-1927), and others.

Annotations with arrows point to various elements:

- "Click this tab to display the Family View." points to the "Family" tab in the top navigation bar.
- "Three generations are shown." points to the parents, the main couple, and the children section.
- "Click in this box to move the parents down to the Husband/Wife position." points to the "Parents" section.
- "Right-click on a child's name to pop up an options menu concerning the children." points to the name of a child in the Children list.
- "Click on a child's name to move him/her up to the Husband/Wife position with his/her spouse." points to the name of a child in the Children list.
- "Click here to edit the wife." points to the name of the wife, Eleanor Huffman [34].
- "Click here to enter marriage information." points to the "Marriage" section.
- "Click here to edit the husband." points to the name of the husband, Asa Clark Brown [1].

Three generations are shown in this view – the main couple are shown in the middle (usually a husband and wife). The parents of the husband and the parents of the wife are shown above them. The children of the couple are shown below them. A single click on any parent's or child's name moves that person to the central *Husband/Wife* position, thus moving the display up or down one generation. (If you want to use a double-click instead of a single click to move people, you can make the change on the **Options > Customize > General** section.)

If pictures have been linked to the husband or wife, small thumbnail views are shown of the preferred pictures. Also note the icon buttons for spouses, siblings, notes, pictures, etc. shown in the *Husband* and *Wife* boxes. These icons take on color if there is data in their respective windows.

Children

The Children's section shows up to 21 children at a time, depending on your screen resolution and the size of the main Legacy window on the screen. If there are more children than can be shown at once, a scroll bar is included on the right to scroll to the additional names.

Cell- or Grid-Mode

The list of children in the Children's section can be shown as cells or in a grid-style format.

Cells:



Grid-Style:

Children				
#	Full Name	Sex	Birth Date	Birth Place
1	Brown, Joshua Marsden [76] (1833-1911)	M	30 Sep 1833	Tionesta, Venango, Pennsylvania, U
2	Brown, Samuel [75] (1835-)	M	17 Jun 1835	Tionesta, Venango, Pennsylvania, U
3	Brown, William C., Reverend [74] (1841-1886)	M	3 Apr 1841	Scrubgrass, Venango, Pennsylvania
4	Brown, John W. [73] (1843-1885)	M	7 Aug 1843	Scrubgrass, Venango, Pennsylvania

To change from one style to the other, right-click on the name of any child in the list and then choose **View > Scrolling List (grid)** from the popup menu. Choosing this option toggles back and forth from cell-mode to grid-mode.


Change the Number of Columns

When you are in cell-mode you can choose the number of columns in the list – from one to three. Selecting more columns results in more names being shown but less information for each name (birth and death information). There is an additional column option of “Best fit” that offers a compromise of benefits. When there are few enough children to all fit in one column, the cells expand to the full width of the window. If two columns are required to display all the names, the cells automatically change to half the window width. Three columns are used if the names won't fit in two columns.

Showing Half Children in the List

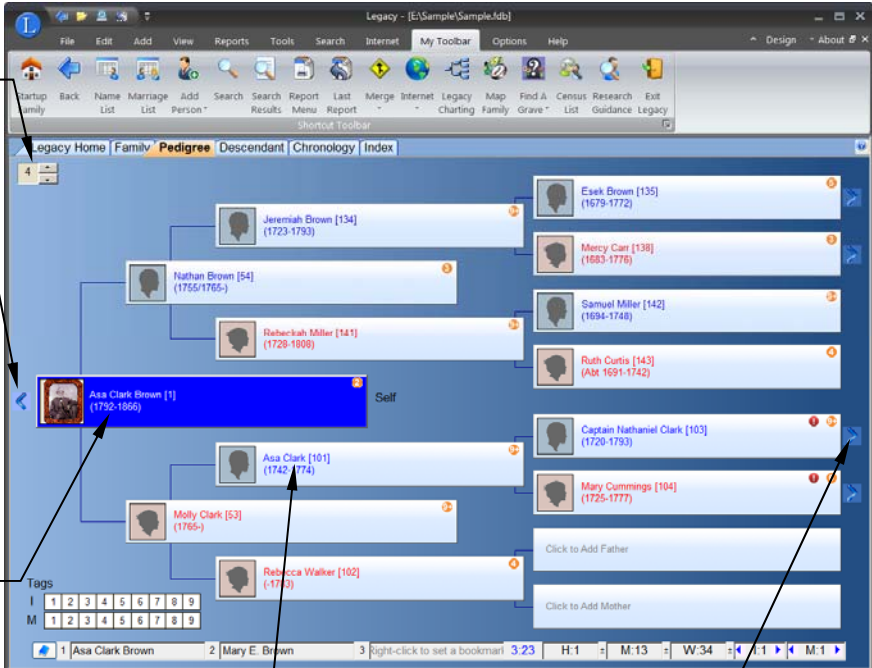
Often, if there are half-children involved in a family, you will want them included in the list as they are really part of the current family. To include half-children, right-click on any child's name and choose **View > Show ½ Kids**. Choosing this option toggles the inclusion of the half-children in the list on and off.

Problem Indicators

Legacy taps into its problem checking routines while displaying information on this screen. When problems are found, a Problems icon  is displayed next to the piece of information causing the problem. Hovering over these icons shows you a short description of the problem. Clicking on the icon displays a list of the problems and how to fix them.

Pedigree View

The *Pedigree View* shows an individual with ancestral lines to the fourth or fifth generation.



Choose a four- or five- generation display.

Clicking on the left arrow moves down one generation.

Vital statistics for the current person.


Click on any name to pop up a list of siblings, spouses, and children.

Clicking on right arrow moves up one generation.

When you hover the mouse over the name box of anyone in the *Pedigree View* a list pops up showing the *Spouses* and *Children* and *Siblings*. You can navigate to anyone on the list by clicking on the desired name in the list. The selected person becomes the main primary person on the left side of the chart.

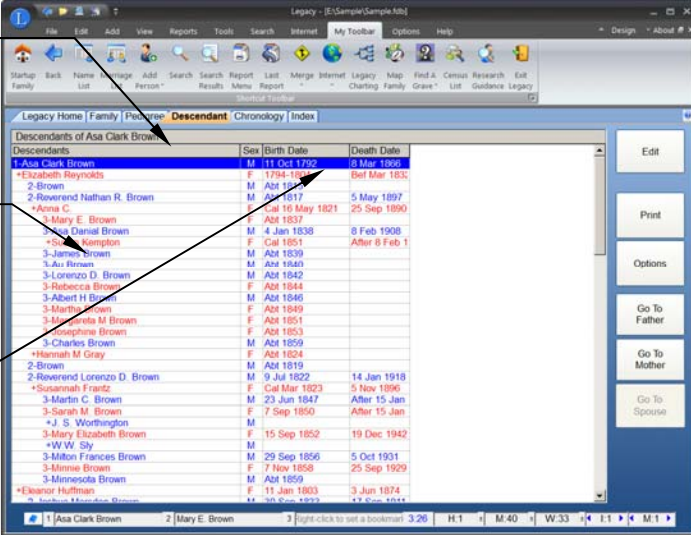
Double-clicking on a name moves the individual to the primary position at the left of the screen. Clicking the left arrow to the left of the primary individual moves the display one generation younger (to the *preferred* child). Clicking on a right arrow next to the oldest generation along the right, moves the display back one generation older.

Problem Indicators

Legacy taps into its problem checking routines while displaying information on this screen. When problems are found, a Problems icon  is displayed next to the piece of information causing the problem. Hovering over these icons shows you a short description of the problem. Clicking on the icon displays a list of the problems and how to fix them.

Descendant View (Deluxe Edition)

The *Descendant View* displays the current person and all his or her descendants in chart form for a given number of generations. Each name is color-coded to show gender and many columns of information can be selected to include in the table.



Click on the header to select or rearrange columns.

Double-click on any name to regenerate the View for that person.

Birth and death information is shown for the highlighted person.

Name	Sex	Birth Date	Death Date
1-Asa Clark Brown	M	11 Oct 1792	9 Mar 1836
+Elizabeth Reynolds	F	1794-1845	Bel Mar 1835
2-Brown	M	Abt 1845	
2-Reverend Nathan R. Brown	M	25 Mar 1817	5 May 1897
+Anna C.	F	Cal 16 May 1821	25 Sep 1890
1-Mary E. Brown	F	Abt 1837	
1-Daniel Brown	M	4 Jan 1838	8 Feb 1908
+Cecy Tompkins	F	Cal 1851	After 8 Feb 1
3-James Brown	M	Abt 1839	
1-Au Brown	M	Abt 1840	
3-Lorenzo D. Brown	M	Abt 1842	
3-Rebecca Brown	F	Abt 1844	
3-Albert H Brown	M	Abt 1846	
3-Martin Brown	F	Abt 1849	
3-Margareta M Brown	F	Abt 1851	
3-Josephine Brown	F	Abt 1853	
3-Charles Brown	M	Abt 1859	
+Henrietta M Gray	F	Abt 1824	
2-Brown	M	Abt 1819	
2-Reverend Lorenzo D. Brown	M	9 Jul 1822	14 Jan 1918
+Susannah Franz	F	Cal Mar 1823	5 Nov 1896
3-Martin C. Brown	M	23 Jun 1847	After 15 Jan
3-Sarah M. Brown	F	7 Sep 1850	After 15 Jan
+J. S. Worthington	M		
3-Mary Elizabeth Brown	F	15 Sep 1852	19 Dec 1942
+W.W. Sly	M		
3-Milton Frances Brown	M	29 Sep 1856	5 Oct 1931
3-Minna Brown	F	7 Nov 1858	29 Sep 1929
3-Minnesota Brown	M	Abt 1859	
+Eleanor Huffman	F	11 Jan 1803	3 Jun 1874

Navigating the Descendant View

As each name is highlighted, the birth and death information is shown at the bottom of the window along with marriage details. If there is more than one spouse/partner, an **M+** button appears that can be used to show a list of all the spouses/partners.

By default, the *Descendant View* shows up to 10 generations of descendants for the starting person shown at the top of the chart.

If you double-click on any person in the list, that person becomes the main person and is moved to the top and the chart is regenerated to show the descendants of that person.

If you right-click on any person a menu pops up allowing you to **Edit** the person's individual or marriage information, **Add** surrounding relatives (siblings, parents, spouses, and children), **View** lists (parents, spouses, and siblings), and add Notes, Pictures, etc.

The following options are available along the right side of the window:

Edit

Clicking the **Edit** button along the right side displays the current person's *Information* screen where you can view, edit, and add information.

Print

Clicking the **Print** button takes you to the **Descendant Tab** on the *Report Menu* where you can then print a *Descendant Chart* for the main person.

Options

Clicking on the **Options** button pops up a submenu where you can:

Customize Display - Select display options for the descendant chart.

Customize Columns - Choose the columns of information to display with each name.

Zoom - Choose the text size for the descendant chart.

Go To Father

Jumps up in the descendant list to the father of the highlighted person. If the highlighted person is a spouse and his or her father is not in the current list, the list is regenerated with the spouse's spouse as the starting person.

Go To Mother

Jumps up in the descendant list to the mother of the highlighted person. If the highlighted person is a spouse and his or her mother is not in the current list, the list is regenerated with the highlighted person as the starting person.

Customize Descendant Display

The *Customize Descendant Display* screen is reached by choosing **Customize Display** from the **Options** button on the *Descendant View*.

Generations to display - Sets the number of generations to show in the chart.

Indent each generation - Spaces to indent each generation from the left column.

Include RINs - shows the RIN number after each name.

Include Years Lived - shows the birth and death year range after each name.


Don't Repeat Duplicate Lines – suppresses the printing of descendant lines that have already been shown previously on the report. This can happen when a person marries someone he or she is related to.

Max Individuals to Show – limits the report to a maximum number of individuals (up to 5000 at a time).

Customize Descendant View Columns



You can select up to 15 pieces of information to be displayed on the *Descendant View* list. To add, remove, or rearrange the columns, either click on an existing column heading or click the **Options** button and choose **Customize Columns**.

Selecting a Column

To change a column, click the  icon to the right of it. This pops up the *Field Names to Display* list where you can select the piece of information you want to show. Highlight the field you want to include and then click **Select**.

Rearranging Columns

You can move a column to anywhere in the list by clicking it to highlight it and then

clicking the **up** or **down**   arrows to reposition it. You can also use drag and drop to move fields around.

Deleting Columns

To remove a field from the list, highlight it and then click **Delete**. The field is removed from the list and any lower fields move up to fill the gap.

Saving the Column Layout

If you find that you are reusing a particular column layout, you can save it to disk for use in the future. Up to ten different setups can be saved. To save a setup, click **Save....** When the *Save Column Layout* window appears, select one of the ten save positions by

clicking on it. Next, enter a name (up to 40 characters) in the **Name** field to describe the setup and then click **Save**.

Loading a Saved Column Layout

You can retrieve a saved setup by clicking **Load....** When the *Load Column Layout* window appears, highlight the entry you want to load and then click **Load**. (Or just double-click on the entry.) You can also right click on the column headers and choose another of your saved layouts.

Restoring the Defaults

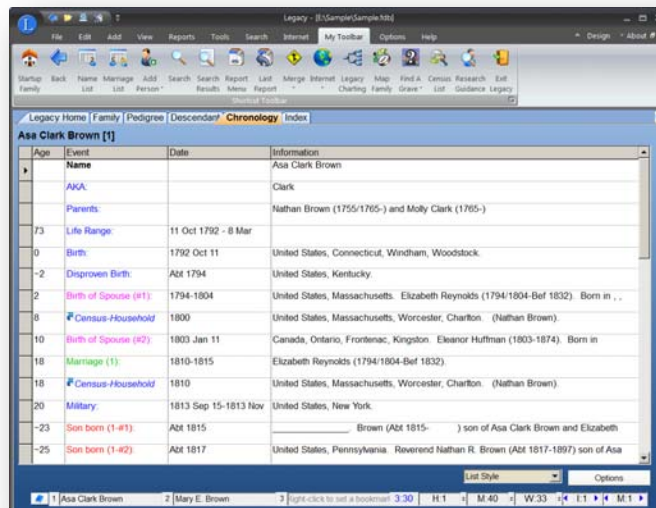
To reset the column layout to just include name, sex, birth date and place, and death date and place, click **Default**.

When you are done, click **Close**. The new column layout is then displayed in the *Descendant View*.

Chronology View (Deluxe Edition)

The *Chronology View* shows the name of the current individual and all the surrounding events associated with that person. These events include the person's birth, christening, death, and burial information, his or her individual events, marriages and marriage events, the birth of children, parents, and the individual and marriage notes. Grandparents and grandchildren can also be optionally included. All these events are arranged on the view in date order so you can see what affected this person throughout his or her life.

To display the *Chronology View*, click on the **Chronology** tab.



Options

Display Options

Displays the *Chronology View Options* screen. This screen lets you select and deselect the information that is shown on the view, change color highlighting, change column widths, and set report options. (See *Chronology View Options* on page 22 for more information.)

Report

Generates a print preview of the *Chronology Report* using the options set in the *Chronology View Options*. This report can include a timeline chart and an ages column as well as other color and formatting options. (See *Chronology Report* on page 150 for more information.)

Compare Two People

Takes you to the Chronology Comparison screen where you can compare two people's events to better see if they might actually be the same person.

Help

Displays the help topic describing the Chronology View.

Navigating

You can use all the standard navigation features available in Legacy while viewing the Chronology. These include **Bookmarks** and **Quick Bookmarks**, **Individual** and **Marriage tags**, the **Back** and **Forward buttons**, and the **History List**. You can also change to other individuals by using the **Name List** and **Marriage List**, as well as by using the **Search** features and the **Go To ID Number** feature.

Chronology Display Options

This options screen (reached by clicking the **Options** button and then choosing **Display Options**) lets you select and deselect the information that is shown on the view, change color highlighting, change column widths, and set report options. The options are arranged on six tabs, each of which is described below. All the options on all the tabs apply to both the *Chronology View* and the *Chronology Report*.

Include Tab

Individual Events includes the person's individual events. You can then choose whether or not to include the notes, private events, event addresses, phone numbers, e-mail addresses, or home page URLs.

LDS Information includes the LDS ordinance information for the current person.

Marriage Events includes the marriage events. You can then choose from the options below it, which include the same choices as the Individual Events with the addition of whether or not to include children and spouse's life range information.

Extended Family You can choose additional generations to include in the chronology view. These can include grandparents, parents, children, and grandchildren. There is an option to include the information from these generations that falls within the lifespan of the main person.

Other Options

Historical Timelines You can include background timeline events in the chronology to give historical perspective to your ancestor's life. Legacy installs several general timelines to choose from, or you can create your own. You can select one or more timelines and limit your selection to one or more events from each timeline. To select one or more timelines, click the **Select Background Timelines** button. For more information see *Selecting Timelines*.



(Help index: **Selecting Timelines**)

Notes Select the note types you would like to include on the view or report.

Cause of Death Include how or why the person died.

Stories You can include a person's stories in the list.

Color Coding You can have certain elements of the report shown or printed in color to make them more easily identifiable. These include the color of the names for the main person, parent's, grandparent's, children, grandchildren, marriage information, spouse names, and historical timeline events.

Formatting Tab

Other Formatting options are to print all names in bold, remove quoted given names, print event names in bold, remove one or more leading commas on locations, remove two or more leading commas from locations, and add an Age column.

Age Column (on screen) Includes an age column on the screen display. The Age column shows how old the main person was when each event happened.

Analysis Formatting The *Chronology View* and *Chronology Report* are very useful when trying to see where people traveled during their lifetimes. Legacy offers two options that make this information much more noticeable on the report. The first

is the reversal of the date column so that the year comes first. This makes it easier to glance down the column to see what years the events occurred. The second is to reverse the order of the location field and place it at the beginning of the descriptive column in optional bold type. You can then quickly see the locations encountered during the person's life.

Birth and Death Information You have the choice of including the years only, or the full dates and locations of the birth and death on individual names within the report.

Column Widths Tab

You can specify how wide the **Date** and **Event** columns will be on the screen.

Report Options Tab

Report options apply to the creation of a *Chronology Report*. (See *Chronology Report* on page 150 for more information.)

Timeline Column is a graphical representation of the timespan of each event represented on the report. It allows you to easily see how events overlapped and shows everything that was happening at any particular time. The bars in the timeline are colored according to the settings on the **Formatting** tab.

Shading the Life Range extends the life range of the main person down the entire timeline behind all other events. This way you can easily see where the events occurred within the life of the individual.

Age Column shows how old the main person was when each event happened. The Age column can also be shaded along the right edge to produce a 3D effect.

Print in Black and White The *Chronology Report* normally prints in color, but if you have only a black-and-white printer you can change the color to only black and white.

Lines This option allows you to print horizontal lines between each event.

Average Life Span specifies the average lifespan you want to use for child and spouse bars when the death dates are not available.

Print Individual's Picture includes the picture of the individual. You can also choose to have a drop shadow printed behind each picture by selecting the **with Shadow** option.

Print Private Individuals includes the names of individuals who are marked as Private on their Information screens.

Print Invisible Individuals includes the names of individuals who are marked as *Invisible* on their Information screens.

Report Title You can change the title of the report as desired.

Privacy Options

Click this button to change the settings for printing *Private* and *Invisible* individuals.

Change Fonts

You can specify the font name, size, and style to be used in each section of the chronology report. See Report Fonts for more information.

Page Setup

You can change the settings for page margins, orientation, paper size, border lines, header positions, page numbering, compiler information, and footer contents.

Printer Setup

Lets you change the page size and orientation before generating the report. You can also change the target printer and its specific settings.

Print or Preview

The **Print** and **Preview** buttons are used to produce the report and send it directly to the Printer or to the Preview screen.

Sources Tab

Here you can choose to include source citations when printing the Chronology report, and specify the formatting and contents of the citations.

Screen Fonts Tab

You can select between Arial and Times New Roman for the various sections of the screen display. **Note**, these two fonts work well on the screen. You can choose other fonts when printing the report.



(Help index: ***Chronology: View Options***)

Index View

The *Index View* displays all the individuals in your family file. The information displayed by default includes the record identification number (RIN), full name, gender, and the birth and death date and place.

Click **RIN** to sort the list in record number order.

Enter a RIN here to jump to that record in the list.

Click **Given** to sort the list in order of given name(s).

Click **Surname** to sort the list in surname order.

You can drag these column guides to change the column widths.

Right-clicking a name displays a menu of options where you can edit, add relatives, etc.

Click **Options** for a menu of things you can do to the format of the Index View.

RIN	Full Name	Sex	Birth Date	Birth Place	Death Date	Death Place
1	Brown, Asa Clark	M	11 Oct 1792	Woodstock, Windham, Conne	8 Mar 1866	Minneapolis, Hennepin, Minne
24	Brown, Asa Daniel	M	4 Jan 1838	, Pennsylvania, United States	8 Feb 1908	Chanhasen, Carver, Minneso
9	Brown, Au	M	Abt 1840	, Pennsylvania, United States		
137	Brown, Chad	M				
122	Brown, Charles	M	12 Apr 1803	Charlton, Worcester, Massach		
11	Brown, Charles	M	Abt 1859	Minnesota, United States		
50	Brown, Charles David	M	5 May 1878	Clotho Or Osakis, Douglas, M	13 May 1943	Coeur D'Alene, Kootenai, Idah
96	Brown, Charles W	M	Abt May 1900	, Pennsylvania, United States		
92	Brown, David Clark	M	24 Nov 1846	Deerfield, Warren, Pennsylv	9 Feb 1927	Everett, Snohomish, Washing
170	Brown, Emma Jane	F	Feb 1863	, Pennsylvania, United States	After 15 Feb	
135	Brown, Esak	M	1879		1772	
63	Brown, Eva Jane	F	12 Mar 1876	Minnesota, United States	1956	
120	Brown, Frank	M	20 Sep 1799	Charlton, Worcester, Massach		
59	Brown, Hattie Mina	F	8 Feb 1875	, Minnesota, United States	After 18 Jul	
136	Brown, James	M	Abt 1839	, Pennsylvania, United States		
17	Brown, James	M	1723		1793	
134	Brown, Jeremah	M	7 Aug 1843	Scrubgrass, Venango, Penns	5 May 1885	Leslie, Todd, Minnesota, Unio
73	Brown, John W	M	Abt 1853	, Pennsylvania, United States		
76	Brown, Joshua Marsden	M	30 Sep 1833	Tionesta, Venango, Pennsylv	17 Sep 1911	Hennetta Township, Hubbard, I
150	Brown, Kenneth Loraine	M	16 Sep 1900	Akeley, Hubbard, Minnesota	14 Sep 1967	Pendleton, Umatilla, Oregon, L
95	Brown, Kenneth Wilmer	M	2 Apr 1889	Oak Park, Benton, Minnesota	4 Nov 1896	Langola, Benton, Minnesota, L
65	Brown, Lela Eldusta	F	21 Jul 1873	Irving, Kandiyohi, Minnesota	1 1909	
61	Brown, Linda Etta	F	13 Dec 1869	, Minnesota, United States	After 18 Jul	
98	Brown, Loraine Chandler	M	8 May 1875	Saint Cloud, Stearns, Minneso	17 Jan 1929	Sipoco, Luzon Island, Phillipin
43	Brown, Lorenzo D., Reverend	M	9 Jul 1822	Tionesta, Venango, Pennsylv	14 Jan 1918	Minneapolis, Hennepin, Minne
16	Brown, Lorenzo D.	M	Abt 1842	, Pennsylvania, United States		
167	Brown, Loring Marsden	M	9 Nov 1887	Brainerd, Crow Wing, Minnes	31 Jan 1966	Glenwood City, Saint Croix, W
94	Brown, Mabel Claire	F	27 Apr 1892	Saint Cloud, Stearns, Minneso	20 Jan 1988	Everett, Snohomish, Washing

Sorting the List

The *Index View* can be displayed in surname, given name, or RIN order. Click the **Surname**, **Given** or **RIN** button at the top of the window, or click in the **Surname**, **Given** or **RIN** box. The list is then redisplayed in that order.

Finding an Individual

If the list is long, you can search for an individual in the list by RIN, given name or surname. To search by surname, click in the **Surname** box and type the name you want to find. Enter the surname first, followed by a comma and then the given name(s). To search by given name, click in the **Given** box and type the given names, followed by a comma and then the surname if known. To search by RIN, click in the **RIN** field and type the number you want to locate.

Changing the Columns

► To customize the columns:

1. Click on any of the column headings. This displays the *Customize Index View Columns* screen.
2. Add or change the pieces of information you want to display in each column.



(Help index: **Customize Index View columns**)

3. Click **Close**.

► To change the width of the columns:

You can change the width of each column by dragging the right header boundary to the desired width. Legacy then remembers these widths.

Options

Clicking the **Options** button displays a shortcut menu:

Include Alternate Names inserts the alternate names for each individual into the name list. Alternate names are displayed with a leading tilde character (~).

Include Married Names adds the name of the wife (or husband) was known as while she (or he) was married.

Change Sort/Search to User ID changes the RIN search field to User ID. When you use this field to search, the closest matching User ID number is located in the list. (If you are using the User ID number for searching you should include the User ID as one of the columns in the Index View.)

Customize Columns displays the *Customize Index View Columns* screen where you can select the columns you want to include.

Zoom lets you select the font size for the Index View list.

Edit

You can edit any individual in the list by right-clicking his or her name and choosing **Edit** from the shortcut menu. (You can also double-click the name.) The *Information* screen for that person is displayed.

Using the Help System

Looking for Assistance When You Need It

Getting Help

The Help System

Legacy includes an extensive context-sensitive help system to provide you with easily accessible information about program features and techniques. The help system contains all the information in the Legacy User Guide and more, optimized for use while using Legacy itself. In addition, the help system is updated when features are added or modified in subsequent releases.

Context-Sensitive Help

To open the Help system, choose **Help Index** from the **Help** tab on the Ribbon. The *Contents* screen opens where you can select the type of help you need.

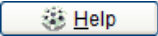
You can also get immediate help about any window or dialog box in Legacy by clicking **Help** on that window.



Scattered throughout this User Guide are help index hints:

When you see one, you can find additional information about the current subject by searching for the indicated search keywords in the help system.

Help Videos

Many windows also offer short helpful videos that explain the operation and options on the current window. Help buttons that include videos have a film reel graphic on them.  When you click these buttons, a popup menu appears with the options to **Show Help Topic**, which displays the regular context-sensitive help screen, or **Show Help Video**, which when you hover over it, shows a submenu with the available videos. Clicking on a video name launches your browser and plays the video.

Getting Help on the Legacy Homepage

You can get a lot of help by going to our Legacy home page, (<http://www.legacyfamilytree.com/>), by clicking on the **Help Center** dropdown menu. This gives you the following choices:

Troubleshooting Help
Submit Support Ticket

Make a Suggestion
How to import files from other programs
Learn to Use Legacy
Tips
Frequently Asked Questions
User Groups
Legacy Users' Email List
Affiliates
Sitemap
Contact Us

Going through these options can answer many of the questions you might have while using Legacy.

Learn to Use Legacy

This option tells you how to get step-by-step instructions on using Legacy as well as many tutorials, videos, tips and tricks, and other helpful resources.

Legacy Users Group

There are many user groups that have been set up around the world. These are listed when you click the User Groups option and gives the contact information for each one. This gives you the opportunity to ask questions to other Legacy users who are usually more than willing to help you out. You can also subscribe to the main Legacy User Group email list. This results in all the questions and answers from all participants to be emailed to you each day.

Legacy KnowledgeBase

Legacy has many, many tips and how-to articles that can help you get the most from the program. Click on the **Tips** option for a complete list.

Frequently Asked Questions

Click this option to see the list of frequently asked questions that we have received over the years. These articles may be just what you are looking for.

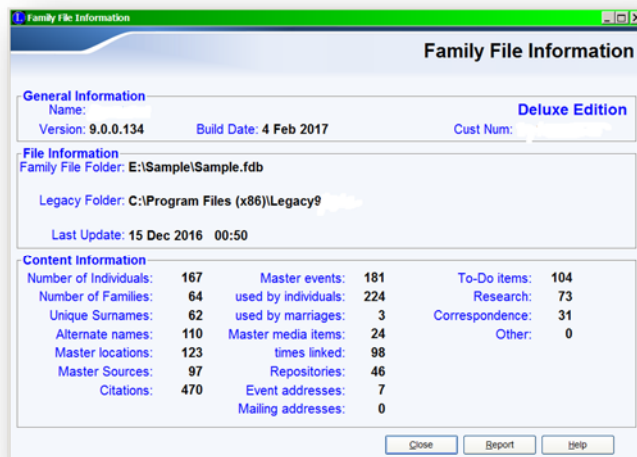
Legacy Facebook Support Group

Got a question, want to share a favorite tip, or just want to get ideas from others? Join our Legacy User Group on Facebook for a thriving community of other Legacy users. Here we also post announcements and keep you "in the know" with what's happening with Legacy and our webinars. Join at <https://www.facebook.com/groups/LegacyUserGroup> for free.

Family File Information

Choosing **File Properties** from the **Help** tab brings up the *Family File Information* window:

This window shows the licensed user name and registration number, program version, build date (date of the program or last update), along with the location of your family file. In addition, the window displays the number of individuals and families in the current file, plus many other statistics about your file.



Printing a Report

You can print a report showing the information from this window by clicking the **Report** button at the bottom.



(Help index: **Report: Information**)

Order Form

Selecting this function from the **Help** tab of the **Ribbon** takes you to the Legacy online store in the Legacy Products section. From here you can order several different variations of Legacy (downloaded or shipped).

Other Support Features

Tech Support – Opens the Legacy Technical Support web page in your Internet browser. This contains a lot of information about solving problems you may run into in the program.

Report a Bug – Opens the Problem Report Form webpage so that you can tell us about a problem you might be having while using Legacy.

Request Feature – Opens the Make a Suggestion webpage so you can request a new feature that you would like to see in an upcoming version or update of Legacy.

Legacy Homepage – Opens your browser window and displays the Legacy home page.

Download Update – Opens the Download Legacy Update webpage where you can download the latest update of the program.

Beginners Video – Opens your web browser and displays the page where you can watch the Legacy for Beginners training video.

About Legacy

Choosing **About Legacy** from the **Help** tab of the **Ribbon** option displays the splash screen giving the Legacy copyright. Clicking **Company** displays a screen showing the different ways you can contact Millennia. Clicking **General** displays the *Family File Information* screen.



Unlocking the Deluxe Edition

If you have been using the Standard Edition of Legacy and then decide to order the Deluxe Edition, you will have to enter your new customer number (received when you purchased the Deluxe Edition) to unlock the Deluxe features. This is done by choosing **Unlock Legacy Deluxe** from any of the tabs of the **Ribbon** bar and then entering your name and customer number.

Entering Your Data

Recording All the Facts and Events for an Individual

Legacy has many easy-to-access forms to allow you to enter the information you have found on your family.

Individual's Information Window

The *Individual's Information* window is reached by right-clicking on a person's name on the **Family, Pedigree, Descendant, or Index View** and then choosing **Edit**. Clicking on the Husband or Wife name on the Family View also opens the *Information* screen for that person. This is where you enter all the individual information for the current person. This includes his or her name; birth and death dates and locations; gender; reference numbers; and extra event data. The name and location fields use type-o-matic (auto completion) fields.

Individual's Information

Given: Asa Clark
 Surname: Brown
 Living? Yes No
 Title Pre.: Title Suf.:
 Born: 11 Oct 1792 in Woodstock, Windham, Connecticut, United States (224)
 Chr:
 Died: 8 Mar 1866 in Minneapolis, Hennepin, Minnesota, United States (73)
 Buried: Mar 1866 in Minneapolis, Hennepin, Minnesota, United States (73)

Age	Event/Fact	Date	Desc/Place/Notes
~2	Disproven Birth		, Massachusetts, United States
~2	Disproven Birth	Abt 1794	, Kentucky, United States / Kentucky was likely a mis
8	Census-Household Me	1800	Nathan Brown - Chariton, Worcester, Massachusetts,
18	Census-Household Me	1810	Nathan Brown - Chariton, Worcester, Massachusetts,
20	Military	15 Sep 1813-9	, New York, United States / He was substituted for a
28	Census	1820	Allegheny, Venango, Pennsylvania, United States / <1
33	Deed	2 Sep 1826	, Venango County, Pennsylvania, United States / Wal
39	Deed	6 Aug 1832	, Venango County, Pennsylvania, United States / Artic
48	Census	1840	Scrubgrass, Venango, Pennsylvania, United States /

Repeat This individual never married and had no children
 Exclude from Potential Problems...
 User ID: AFN: FamilySearch ID: FindaGrave ID: 49047445
 Privacy Settings... (Not Private)
 Birthday Reminder
 Death Date Reminder

Legacy 'remembers' data entered into certain fields. When you start to enter data into these fields Legacy will automatically, as soon as it 'recognizes' the data, fill in the remainder of the characters. This may or may not be precisely what you want, so check carefully before saving your entry. (For example, if you have entered "St. Paul, Ramsey,

Minnesota" in a location field and intend to enter "St. Paul, Alberta, Canada" in another field, make sure you type enough of the field to get what you want.)

The *Information* screen also contains an *Events* section where you can enter separate items related to that individual's life.

Also from this window, you can access the *Notes* section, the *Media Gallery*, the *To-Do List*, and the *Address* screen, as well as the *Calendar and Date Calculator* and the *Alternate Names* screen. These icons take on color if there is data in their respective windows.


Given Names

Enter all the given names for the individual. This includes the first name and all middle names, including initials. Don't include nicknames or alternate names, which should be entered in the *Alternate Names* window (see below). The Given name field can hold up to 120 characters. **Note**, you can include a quoted name in the Given Name to be used when creating narrative sentences on reports. For example, William "Bill" Smith. Reports have the option to use the quoted name – "Bill was born on 25 Dec 1888..." There is also an option to remove the quoted names.

Surname

Enter the surname for the individual. When you leave the field, Legacy applies the formatting specified in the *Customize* section (see page 212) and capitalizes the first letter or the entire word, depending on the format selected (unless you have used a capital letter in the surname. Once you use a capital letter, Legacy switches to "Don't change what I enter" mode.). Do not include things like Jr., Sr., II, III, etc., which should be put in the title fields. The Surname field can hold up to 120 characters.

Alternate Names

You will often encounter given names and surnames that are spelled differently. Many times, the spellings differ within the same source. You can record all these variations as alternate names by choosing the **AKA**  icon to the right of the *Surname* field. (See *Entering Alternate Names* on page 47 for more information.) The Alternate given and surname fields can hold up to 120 characters.

Title

Prefix and suffix titles include Jr., Sr., Rev., Major, General, King of England, etc. These fields can hold up to 50 characters.

Living Indicator

Use this field to show if the person is alive or dead. This setting can then be used when creating reports and web pages, or exporting files, to protect the privacy of living individuals by not including their personal information.

Gender

Choose either **Male** or **Female**. If you don't know the gender of the individual, click **?** (which means unknown). If you are entering a spouse to an existing person, the gender is automatically selected as the opposite gender but can be changed in order to enter same-sex relationships.


Dates

Enter the date for each event, such as birth, death, burial, etc., that you know. You can enter the dates in any format desired and Legacy changes them to the date format set in the *Customize* section (see page 212). (See *Enter > Dates in date fields* in Legacy Help for more information.) Dates can be up to 45 characters long.

Possible Duplicates


As you add new people, Legacy checks to see if there is a possibility that the person is already in your family file. This is done by comparing the name, birth, and death information with others in the file. If a match is found, Legacy pops up a Possible Duplicate screen for your verification.

The individual you just entered is displayed on the left side of the screen with whatever vital information you just entered, and the possible duplicate (or the first of several possible duplicates) is displayed on the right side. After comparing the two people's information, if you decide that they are the same person, click the **Yes**, or **I'm not sure** button. This will display a *Merge* window where you can combine the information from the two individuals into the existing person's record (or finally decide that the two are not the same). If the person on the right is not the same person as the one you just entered, click the **No** button.

If Legacy finds more than one person who might be a possible duplicate, you can see how many there are to look at up in the upper-right portion of the window. For example, if six possible duplicates were found, you will see . You can use the left and right pointers to move to the previous or next person in the group to see if the person you just entered matches one of them.


The rules for looking for possible duplicates can be set and changed by clicking the **Options** button in the lower-left corner


Calendar

Whenever you are filling in a date field, you can use the pop-up calendar for help by clicking the **Calendar**  icon. Selecting a date from the calendar automatically fills in the date field.

Locations

Locations for events should be entered in a consistent format. Use the format of city, county, state or province, country. When entering place names in your own country, you may think that it is sufficient to just include the state abbreviation and leave off the country; however, for completeness, you should always include the country. You never know who might be using your family file in the future and in what country they might be living. The Location fields can hold up to 255 characters. You should use all the intermediate commas to show where information is missing and to clarify what each piece means. **Bergen, New Jersey** could mean Bergen County or the city of Bergen. **Bergen, , New Jersey, USA** makes it all perfectly clear that Bergen is the city and that the county name is missing.


Locations can also be selected from a list of previously entered locations. Using the down arrow  to the right of the location fields opens the *Master Location List* from which you can find and select existing locations. You can also quickly open the location edit screen to modify a location entry by right-clicking the down arrow.



The *Deluxe Edition* of Legacy also includes a **Geo Location Database** containing millions of place names from around the world. You can access the Geo feature by clicking the **Geo**  button to the right of any location field.

Locations Memorized (Deluxe Edition Only)

As you enter places into location fields in Legacy, the most recent ten place names are remembered and can be quickly displayed in a popup list and selected. To display the list of the last ten place names, right-click on the field label to the left of any location field. From the resulting popup list of place names you can select one to fill into the location field by clicking on it. To clear the location list and start over, click (**Clear all memorized locations**) at the bottom of the list.

Additional Information for Birth, Christening, Death and Burial fields.

At the right end of the **Birth**, **Christening**, **Death** and **Burial** fields there is a button  that lets you add notes, addresses, pictures that are specific to these fields and

Share this event. Click on the  for the **Born** field, for example, pops up a shortcut menu with the options: **Birth Address**, **Birth Notes**, **Birth Pictures**. Clicking on the desired option opens the appropriate window for adding the information. By clicking on the  button beside the **Burial** field, you can change the burial event to a cremated event. Making this change changes the term used on reports for this individual. It also changes the term on the Family View.

US County Verifier (*Deluxe Edition Only*)

When you exit a location field, Legacy checks the validity of county names for locations in the United States (if the **Verify US Counties in Place Names** option is turned on in the *Customize* section). An error is reported if:

- No county by that name was ever found in that state. (This could also be the result of a misspelling.)
- The county was not in existence in this state at the date specified.
- The County had been dissolved in this state before the date specified.

When an error is reported, you can choose to view a list of all the counties in that state to see when they were founded and their periods of existence.

You can turn off **US County Verification** while viewing any error message. (To turn it back on, reset the option on the **Data Entry** tab of the *Customize* section—Option 2.1.)

User ID Number

The **User ID** field is for any reference number you want to record for this individual. You can use any combination of letters, numbers, and punctuation marks.

Ancestral File Number

The **AFN** field is for the identifying number assigned by the Church of Jesus Christ of Latter-day Saints when the individual has been submitted to the Ancestral File. Each person is assigned a unique number. The Ancestral File Number can be up to 20 characters.

FamilySearch Number

This field is for the identifying number assigned by the LDS church when the individual has been added to the FamilySearch Tree. Each person is assigned a unique number. You can fill in the FamilySearch number yourself but it is usually filled in automatically when you use the Legacy FamilySearch integration module to

connect to the FamilySearch Tree and confirm a match. It can also be filled in when you import a GEDCOM file that contains these numbers.

Find A Grave ID

FindAGrave.com is a free commercial site where thousands of individuals around the world have submitted millions of pictures of headstones along with the information on them. It is a great source of information. Legacy includes the ability to search for Find a Grave memorials and link to them by the memorial number. If you click on the **Find A Grave** label, Legacy will launch a search for the current person's name. If a memorial is found, you can copy and paste any information you need into Legacy. You might also want to copy the picture of the headstone, if there is one, and link it to the burial information or picture gallery for the person. (If there is already a **Find A Grave** memorial number in the field, clicking the label will take you directly to the memorial.) **Note**, if you want to use a headstone photo in any publication, you should seek permission from the photographer who holds the copyright.

BillionGraves ID

BillionGraves is a free website to look up headstone photos from around the world. Volunteers use Smartphones to take GPS tagged photos of headstones. Photos are uploaded to the BillionGraves website. Photos are transcribed by volunteers. Photos can be easily accessed for research online. (this description is from the BillionGraves.com website.)

Birthday Reminder

If you would like to be reminded of the birthdate of this individual a few days before it happens, put a checkmark in the **Birthday Reminder** option in the lower-right corner of the window. The reminder will be displayed on the **Legacy Home** tab.

Death Date Reminder

If you would like to be reminded of the death date anniversary of this individual a few days before it happens, put a checkmark in the **Death Date Reminder** option in the lower-right corner of the window. The reminder will be displayed on the **Legacy Home** tab.

Using the Source Clipboard

The *Source Clipboard* is a feature in Legacy that can tremendously increase the efficiency with which you document the sources of the information you enter into your family file. (See *Source Clipboard* on page 88 for information on how and why to use this feature.)




Person Never Married

If you know that the current person was never married during his or her lifetime, you can select the **This Individual Never Married and had no children** checkbox. The Marriage bar on the Family View will then say "*** Never Married**." This box can only be checked if there is no spouse or child linked to him/her and no marriage information has been entered.

Standardization Checking

Many standardization checks have been added that pop-up if something questionable has been entered in the Individual's Information screen. These have also been added to the Potential Problems report. See the **Standardization** tab of the **Potential Problems Report** for a list of the problems Legacy checks.

Monitor Potential Problems

Legacy taps into its problem checking routines while displaying information on this screen. When problems are found, a Problems icon  is displayed next to the piece of information causing the problem. Hovering over these icons shows you a short description of the problem. Clicking on the icon displays a list of the problems and how to fix them.

Excluding this Person from Specific Potential Problems (*Deluxe Edition Only*)

You can exclude a person from specific, verified problems and leave the remaining information available for future problems checks. To do this, click the **Exclude from Potential Problems** button and select the particular problems you would like to turn off. If any of the conditions are selected for an individual, an asterisk is shown at the beginning of the button caption.


Privacy Settings for Individuals

If you would like to be able to either suppress information or exclude this person from being included on reports, exports, and web pages, click the **Privacy Settings** button in the lower-right corner. All reports, exports, and web pages have an option to include or exclude **Private** and **Invisible** individuals. Information for Private individuals is not exported to GEDCOM files by default, however there is a

checkbox to include it if desired. Invisible individuals are excluded from reports and exports but there is also an override option if you want to include them.

Events


You can attach any number of events to any individual's record. Events in Legacy are facts about the individual's life; an occupation, graduation, enlistment, residence and so on are all considered events. Legacy comes with a set of predefined events you can use, and provides the ability to add new event definitions (or modify the predefined ones).

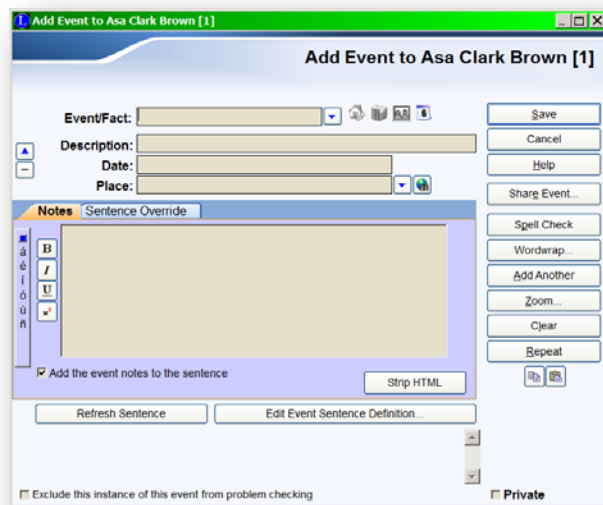
Events can be shared among multiple people. A minister who baptized a person might share the Baptism event for that person. All the individuals in a household might share the same Census event. Different roles can be assigned to the various people who share an event. In the Event list, events that have been shared from another person are displayed with a leading . See *Shared Events* for more information.

An event record consists of an event name, a description of the event, the date and place of the event, and a comment. Only the event's name is required, but the entry would probably seem meaningless without further data. The *Deluxe Edition* of Legacy automatically creates sentences based on the data, formatted according to the event's definition, for any reports you create.




Adding a New Event

► **To add a new event to an individual:**

1. Click **Add** to the right of the *Events* box to display the *Add Event* window.
2. To select an event from the *Master Event Definition List*, either type the name of the event in the **Event** field, or click the  button to the right of the **Event** field to scroll through the list and select an event by clicking on it. (If you want to define a new event that is not



already in the *Master Event Definition List*, see *Editing The Master Event Definition List* on page 43.)

3. In the **Description** field, enter the event description.
4. In the **Date** field, enter the date the event occurred.
5. In the **Place** field, enter the location where the event took place.
6. In the **Notes** tab, enter any information you want to record concerning this event.
7. If you are using the *Deluxe Edition* of Legacy, you will see the event sentence being built as you enter your information. You can edit the Event Sentence Definition to fit the way you normally enter data for this Event type or you can override the sentence definition for this particular event by entering a new sentence on the **Sentence Override** tab.
8. Click the **Source**  icon to record the source of this information if you have it. (See *Citing Your Sources* on page 71 for more information.)
9. Click the **Picture**  icon to add pictures, sounds, video clips, and other files to the event.
10. Click the **Address**  icon to record an address associated with this event.



(Help index: **Add or edit an event**)

Shared Events

A shared event has an owner and one or more witnesses. The term witness might also be described as participants - in other words, someone who had some connection to the event. Witnesses have roles in the event. The event is first entered for the owner - the person who is the primary participant in the event. For a Baptism event for example, the owner would be the person who was baptized. For a Census event, usually the owner would be the head of household. If your ancestor happened to be the first cousin of the head of household and she was temporarily living with the family during the time in which the census was taken, you would probably want to list her as the owner of the event. If you are creating a marriage event, there are two owners, the husband and the wife.

To Create a New Shared Event

1. Create the event for the owner. (See **Adding an Event** above for detailed instructions.)
2. Before clicking the **Save** button to save the event, click the **Share Event** button. The *People Who Share This Event* window is displayed. (If you have already saved an event, then highlight the event you want to share in the *Events/Facts* window and then click the **Share** button.)

3. From the *People Who Share This Event* window click the **Add Person** button and then choose **Add a name from the name list** from the submenu. The *Name List* appears.
4. Highlight the person you want to share the event with and click **Select**. The *Share Event With Another Person* window is displayed.
5. Enter the **Role** that this person played in the event.
6. Enter any notes or comments you want to make.
7. Repeat the process of adding additional persons by clicking the **Add Person** button again.

Sharing an Existing Event

You can also add witnesses or participants to events you have already added to individuals. From a person's *Information* screen, highlight the event you want to share in the *Events/Facts* window and then click the **Share** button. The *People Who Share This Event* window is displayed with the current person shown as the only person in the list so far. Now you can follow the same steps described above (from step 3).



Editing an Event

- ▶ **To change the name, description, date, location, notes, etc. of an existing event:**
 1. Highlight the event line you want to edit in the *Event Box*.
 2. Click **Edit** to the right of the list to display the *Edit Event* window.
 3. Make the desired changes and click **OK** to save them.



(Help index: **Event, Add > Add or Edit an Event**)

Changing the Order of the Events

- ▶ **To change the display order of the events:**
 1. Highlight the event line you want to move.

 2. Click the **Up** or **Down** arrow  at the lower-right corner of the *Events* box (labeled “Set Order”) in the direction you want to move the line.


Event Clipboard

There is a built-in clipboard in Legacy that lets you copy an event and then paste it to someone else.

- ▶ **To copy an Event to the clipboard:**





1. Click the  button.

- ▶ **To past an Event from the clipboard to an event list:**

1. Open the Add Event window for the person or marriage you want to add the event to.
2. Click the  button.

Other Columns on the Event List

There are four other columns at the right edge of the Events/Facts list:

-  Shows if the event had been shared by other people. Hovering over the icon shows how many others share the event.
-  Shows that there is one or more source citation attached to the event.
-  Shows if any media has been linked to the event.
-  Shows if there are any potential problems associated with the event.

Other Options in the Events Box

Press the **Options** button to:

Swap certain events with vital events. You can swap alternate birth (**Alt. Birth**) information with the main Birth information, **Alt. Christening** information with the main Christening information, **Alt. Death** information with the main Death information, and **Alt. Burial** information with the main Buried information. Be sure to highlight the desired **Alt. event** before selecting this option.

Sort Events by Name lets you automatically sort your list of events by the event name. When sorting, any events that do not have a name are moved to the top of the list.

Sort Events by Date lets you automatically sort your list of events by date.

Delete Event lets you delete the highlighted event in the *Information* window.

Zoom lets you vary the font size of the *Events List*.


Editing the Master Event Definition List

- ▶ **To display the *Master Event Definition List*:**

Click the **Down** arrow  to the right of the **Event** field.

Adding or Editing an Event Definition

Use the *Add/Edit Event Definition* screen to add a new event definition or to edit an existing definition that you want to include on an individual or marriage record.

Click the **Add** or **Edit** button on the *Master Event Definition List* screen to reach the *Add/Edit Event Definition* screen. (Click the **down arrow**  at the right side of any

event name field to reach the *Master Event Definition List* screen, or choose **Master Lists > Event Definition** from the **View** tab of the **Ribbon** bar.)

Defining an event includes giving it a name, indicating which information fields you want to go with it, and defining how to create a sentence from the event information when printing a report. Legacy comes with many predefined events that all include sentence definitions. If you would like to see an example, highlight one on the *Master Event Definition List* screen and click the **Edit** button.

► **To define a new event definition:**

1. Enter the name of the event. This name will appear on the *Master Event Definition List* and on the event screens and reports.
2. Indicate the additional fields you want to include with the event. Choose from a **Description** field, a **Date** field and a **Place** field. Most events will include all three fields. The **Description** field, for example, might hold the name of the occupation for an Occupation or Employment event or the name of a school for an Education event. The **Date** field records the date or date range of the event. The **Place** field records where the event happened.
3. Fill in the event sentence formula (if you are using the *Deluxe Edition* of Legacy).
4. Click **Save**.



(Help index: **Event, Add > Add or Edit an Event**)

Defining the Event Sentences (*Deluxe Edition* only)

The sentence definition is used when generating reports and indicates how the pieces fit together. The definition can include one or more conditional fields to show where each piece of information fits. Fields are entered into the sentences between opening and closing square brackets, such as [Desc], [Date], and [Place]. When the sentence is put together for a report, the fields are replaced with the actual contents of those fields from each event. For example, let's say you are defining a School event. The sentence might look like this: He went to school at [Desc] in [Place] in [Date]. When the report is generated, the sentence might become: He went to school at Harvard College in Cambridge, MA in 1979.

Because a sentence will be put together differently depending on the pieces of information available at the time, you can use the fields conditionally – meaning that the field is used in a certain way only if it contains information. For example, placing a [field] in angled brackets make it conditional. < [Date]> means that if there is date information, it is placed in the sentence with a leading space (there is a space between the open < and the [Date] field). Here is a typical sentence:

[HeSheFirst] was cremated< [Desc]>< [Date]>< [PlaceDetails]>< [Place]>.

Notice that [Desc], [Date], [PlaceDetails], and [Place] are all placed in conditional angled brackets and are therefore only included in the sentence if they contain information. There is also a condition you can use to vary the wording if the event is being used for a marriage instead of an individual, and a condition to use if the individuals are still alive as opposed to dead.

For a description of all the [fields] available and how the sentence formula is constructed, see the help topic below.



(Help index: **Event, Add > Add or Edit an Event**)

Other Master Event Definition Options

Clicking **Options** on the *Master Event Definition List* brings up a shortcut menu where you can choose the following:

Delete removes the name of the highlighted event if the event is not being used in any individual's or marriage event list. If the event is currently being referenced, a message displays and the event is not removed. You must remove all references to a particular event before it can be removed from the *Master Event Definition List*.

Tag and Untag all master events or just the currently highlighted names.

Combine Duplicates combines any event names that are identical in every way.

Purge Unused... removes any event names that are not being used in the family file.

Import Lists allows you to import various lists from other family files. These include *Locations, Surnames, Event Definitions, Temples, Marriage Status, Source Types, Child Status, Picture Locations*, and other *Master Source Lists*.

Print lets you print a report of all the event names on the list.

Page Setup lets you change page margins, print orientation, line spacing, paper size, border lines, heading and page numbering options, and footer options..

Zoom allows you to vary the font size of the *Master Event Definition List*.

Remove Name-Only Events If you have events that only have an event name and no other information, you may want to remove them from your family file.

Warning: This could incorrectly remove events attached to individuals or marriages where an event name is the only known information, for example, you might have an “Immigration” event. You know the person immigrated but you don’t know when or where.

Jump with Edit Sorting The Master Event Definition List is sorted by Event Name. If you edit an event name, changing it so that it will now sort to a different location in the list, you can choose to jump to the new location in the list when you Save the change, or you can choose to remain where you were after the edited event is moved to its new sort position.

Set Bookmark lets you “mark your place” in the list so that you can jump back to it at any time in the future using the Go To Bookmark option.

Go To Bookmark allows you to jump back to a previously placed bookmark.

Combining Event Names


You can easily combine two event names. You may wish to do this if you find, for example, you’ve misspelled an event name.

► **To combine event names:**

1. Highlight the event name you want to change.
2. Click **Combine the Highlighted Event Name with Another one in the List** at the bottom of the window.
3. Highlight the event name you want to change it to.
4. Click the same button again, which now reads, **Highlight the Destination, then Click this Button.**

DNA Marker Test Information

There are many companies that offer DNA Analysis so that you can explore your ancestry, lineage, and geographic origins. These tests result in marker values that can be recorded in Legacy. Many of these companies offer comparison searches to find

other individuals that have also been tested and found to be related to you. Clicking the DNA  button opens the DNA Records screen where you can enter the test results of one or more tests.



(Help index: **DNA Records**)

The Information Toolbar

At the top of the *Individual Information* screen is the toolbar:



Hints


Legacy can sift through billions of records from key websites – FindMyPast, FamilySearch, GenealogyBank, and MyHeritage – for new information, pictures, and stories about your ancestors. As you add to your tree, Legacy continues to search – automatically! This is all done in the background while you are using Legacy. When any hints are found for a person, a **Hints** icon shows up next to their name showing you that something has been found. If you hover your mouse over the icon, a quick summary of the number of hints and where they were found is shown in a popup tooltip.



Entering Alternate Names

Many times you will find that a person's name is represented in more than one way. Either the spelling of the name will differ in various sources or the name will be completely different. Sometimes names were changed when a person immigrated to a new country. Sometimes names were recorded wrong because of misunderstandings or bad transcription. Many people go by different names as they grow up, going from nickname to nickname. All of these names should be recorded because you never know when a variation will be used in a new source.

► **To display the *Alternate Name List*:**

Click  to the right of the **Surname** field.

Adding New Alternate Names

► **To add a new name to the *Alternate Names List*:**

Click **Add**. An input window appears where you can type in the new name.



(Help index: ***Alternate names***)

Editing an Existing Alternate Name

► **To edit an existing alternate name:**

Highlight the name and click **Edit**. An input window, filled with the current spelling, appears where you can make the desired changes.


Deleting an Alternate Name

► **To delete an existing alternate name from the list:**

Highlight the name and click **Delete**.

Sources for Alternate Names

► **To add a source:**

Click the **Sources** icon  to add a citation to the highlighted name.



(Help index: ***Citing your sources***)

Swapping an Alternate Name With the Main Name

► **To replace the primary name with one of the alternate names:**



Highlight the name and click **Swap Name with Main Name on Record**.



Adding an Address

You can enter a mailing name, address, up to two phone numbers, an e-mail address, and a home page address for each individual in your family file.

► **To add an address:**

1. Click the **Address**  icon. If you are entering an address for the first time, Legacy builds a standard name and puts it in the name field. You can leave it as is or change it as desired.
2. Fill in the **Sort String** field if you want to print labels in a different sorted order than what is in the **Name** field. For example, you might want to enter Surname, Given Name so that labels will print in surname order.
3. Continue filling in the address, phone number(s), e-mail address, and home page address.
4. Click the  button at the right of **E-mail** and **Home Pg** fields to send a message or connect to the Internet without leaving Legacy.
5. You can include the latitude and longitude for the location.
6. You can associate the person with various mailing lists. The choices are Newsletter, Family Association, Birthday, Research, Christmas, and Holiday.
7. Click the **Tag** box in the bottom right corner to select or deselect this address for future reporting purposes.
8. Click the **Private** box to select or deselect whether or not you want this address printed on reports or exported to other files.
9. Click the **Notes** tab to enter additional comments about this address.



(Help index: ***New address***)

Save saves the address and closes the window.

Cancel closes the window without saving any entries or changes.

Address List opens the *Master Mailing Address List*.

Unlink removes the link to the address in the *Master Address List* (after asking for confirmation) and closes the *Address* window.


Repeat duplicates the entry made in the same field of the last address you entered during the current session. If the current field already contains an entry that would be overwritten by the Repeat option, Legacy asks for permission before replacing it. You can also use **F8** to repeat a field. Clicking the line labels also repeats the entries. Clicking the “Address” label repeats both address lines. Clicking any other repeats just that line (including the “Name” field label). To repeat the entire address, right-click the **Repeat** button.

Help opens Legacy Help.

Picture opens the *Media Gallery* where pictures, sounds, video, and documents can be attached.



Notes


You can add or edit the *General*, *Research*, and *Medical* notes belonging to the individual by clicking the **Note**  icon or by clicking the **F5** function key.




(Help index: **Notes**)



Adding Sources

To document where the individual's information came from, click the **Sources**  icon. (See *Citing Your Sources* on page 71 for more information.)

Adding Pictures, Sound, Video, Documents, and Web Links


You can attach pictures, sounds, video, and web links to an individual by clicking the **Media** icon.  (See *Adding Pictures* on page 243 or *Adding and Recording Sounds* on page 282 for more information.)



(Help index: **Media gallery**)



Calendar and Date Calculator

To access the *Calendar* just click the **Calendar**  icon.

Dates From the Calendar

You can use the built-in pop-up calendar to help you with the Marriage Date field.

Just click the **Calendar**  icon.



(Help index: *Calendar*)

Date Calculator


The date calculator figures the time span between two dates, or calculates the beginning or ending date if you know one or the other along with an age.



(Help index: **Date calculator**)



Adding To-Do Items


If you would like to add a to-do item for this individual, click the  icon. This displays the *To-Do List* where you can add new item or edit existing items. (See page 119 for more information.)



Hashtags (Deluxe Edition Only)

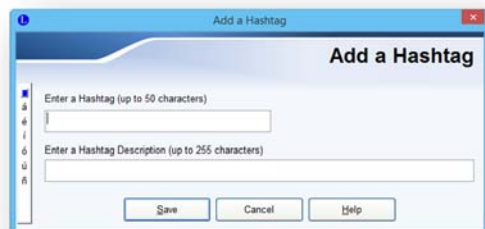
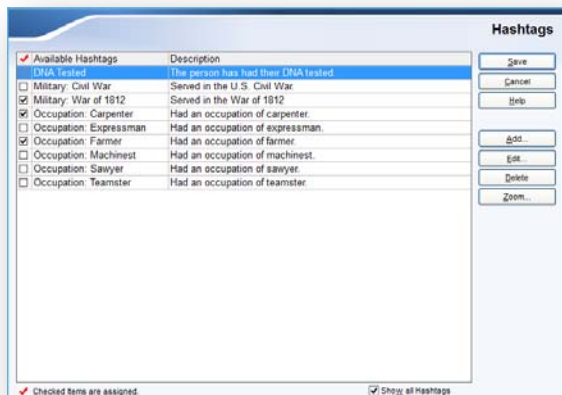
These are useful to create groups of people with a common attribute. For example, you could add a hashtag of "Civil War" to all your ancestors who fought in that war. Or you could add "Farmer" to all who worked on farms for a living. You can add an unlimited number of hashtags to people and you can use them while creating search lists, exporting, reporting, and more.

► To add a hashtag:

1. Click the **Hashtag** icon  on the toolbar. This opens the *Hashtags* window which shows the master list of all the hashtags.

The hashtags assigned to the current person have a checkmark next to them. (You can filter the list to just show the hashtags with the checkmarks by unchecking the **Show all Hashtags** checkbox below the list on the right.)

2. You can assign any other existing hashtag to the current person by clicking on the checkbox to the left of any hashtag in the list (if you have them all showing).
3. If you want to add a new hashtag, click the **Add** button on the right. This opens the *Add a Hashtag* window:



4. A hashtag consists of the hashtag name and an optional description. Enter these and then click **Save**. The new hashtag will then be displayed in the Hashtags list with a checkmark to the left of it.
5. When you are finished adding hashtags, click **Save** to return to the *Information* screen.

Stories (Deluxe Edition Only)

Preserve the stories of your ancestors or stories of your own. The *Stories* tool lets you record, organize, and print stories for any of your ancestors. You can add as many stories as you want to for each person and you can add multimedia and sources for each one. You can also share stories with other individuals in your family file. These might include other people who are mentioned in the story.

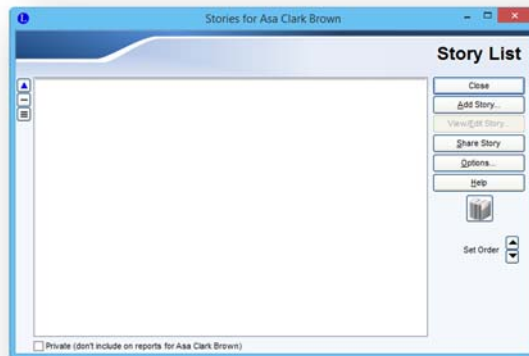
► To add a story:

1. Click the **Story** icon

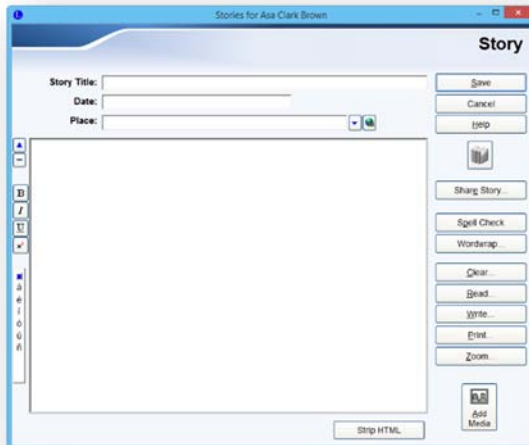



on the toolbar.

This opens the *Story List* window:



2. To add the first story (or to add an additional story) click the **Add Story** button. This opens the *Story* window.



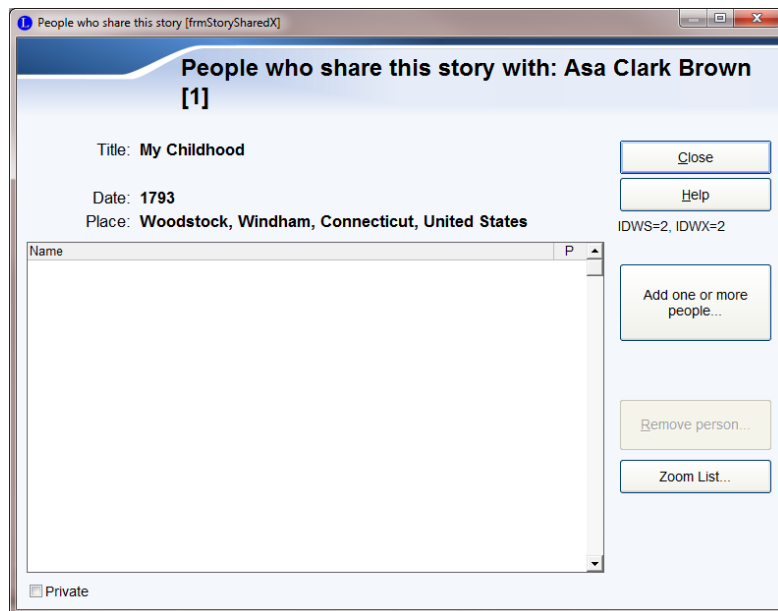
3. Enter a title for the story, the date or date range that the story covered, and the location for the story setting if applicable.
4. Now you can enter the story itself. The story can be up to one million characters long...
5. If you want to link in some pictures or other documents, click the **Add Media** button.
6. Sources can be entered by clicking the **Sources** button .

Sharing Stories

Since stories often include other people, Legacy lets you link multiple individuals to them so you don't have to enter the story again for each person.

► To share a story:

1. From the *Story List* screen, click the **Share Story** button. This displays the *People Who Share This Story* window:




2. Now click the **Add one or more people...** button. This opens the *Name List* where you can select a person (or persons) to share the story with. After choose the desire individuals, click the **Select** button. The additional people you chose will now be displayed in the list.

You can set a **Private** flag for each person who shares in a story. This is helpful when you want to only print a story once on a report for the main person and not repeat it on others who share it. To set this option, highlight the desired person in the list and then select the **Private** checkbox under the list.

To remove a person from the list, highlight his or her name and then click **Remove person**. After confirmation, the person is removed from the list.

LDS Ordinance Information

From the *Individual's Information* window, you can display the *LDS Ordinance*

Information window by clicking the **Temple**  icon, provided you have **Display LDS Information** selected on the **Options > Customize > General** tab. This dialog box lets you record the date and the temple name for baptism, confirmation, initiatory, endowment, sealing to parents, and sealing to spouse. (A summary of the LDS information is shown in a single line just below the *Events/Facts* box.)



(Help index: **LDS ordinance information**)

Source Clipboard

The *Source Clipboard* is a feature in Legacy that can tremendously increase the efficiency with which you document the sources of the information you enter into

your family file. (See *Source Clipboard* on page 88 for information on how and why to use this feature.)



(Help index: **Source clipboard**)

Repeating Fields (Ditto)

Legacy has a *Repeat* feature, commonly known as Ditto. This feature lets you quickly enter recurring information. In all the input fields on the *Information* screen, except the **User Reference Number** and **Ancestral File Number**, you can click **Repeat** at the bottom of the screen to repeat the same information from the same field from the last record saved. If the current field already has an entry that would be overwritten, Legacy asks permission before replacing it. **F8** or **Alt-R** work the same way, as does clicking the label to the left of each field, such as “born” or “died” or “in.”

Memorizing Locations and Dates (Deluxe Edition)

Legacy maintains a list of the ten most recent entries you've made in its various date and location fields.

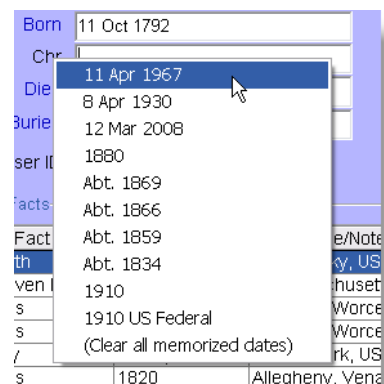
Memorizing Locations

To display the list of entries, right-click on the location field's label (just to the left of the field). Left-click on an entry in the list to place that data in the field. If you want to clear the memorized list, click (**Clear all memorized locations**) at the bottom of the list.

You can also "copy and paste" four separate locations to speed your data entry. In any location field press **Ctrl-F9** and Legacy will memorize the data in that field. In another location field press **F9** and Legacy places the memorized data in the field. You can have up to four locations memorized this way; **Ctrl -F9**, **Ctrl-F10**, **Ctrl -F11**, and **Ctrl -F12** will each remember a separate bit of data. Use **F9**, **F10**, **F11**, or **F12** to enter the memorized data. These are very useful when entering records where everything happened in the same place.

Memorizing Dates

Legacy maintains a list of the ten most recent entries you've made in its various date fields. To display the list of entries, right-click on the date field's label (just to the left of the field). Left-click on an entry in the list to place that data in the field. If you want to clear the memorized list, click (**Clear all memorized dates**) at the bottom of the list.



Saving the Record

When you have filled in the *Information* screen with all the available information, click **Save** to record the entries to disk and return to the previous screen. (If you don't want to save the information, click **Cancel**.)

The Marriage Information Screen

The *Marriage Information* screen is where you record the date, place, status, and sources of information for the current marriage (or partnership). The *Marriage Information* screen is reached by clicking the **Marriage Bar** just below the **Husb** and **Wife** boxes on the *Family View*. It can also be reached by choosing **Edit Marriage** from the **Edit** tab of the **Ribbon** bar or **Edit Marriage** from the right-click menu of the husband or wife.

General Tab

Marriage Date

Enter the marriage date if you know it.

Marriage Place

If you know where the marriage took place, enter the location in the field to the right of "in."

Marriage Status

This field is where you record the final result of the marriage. The default is blank and should be left blank if the couple was actually married and never separated before one or the other died. The other standard choices for the **Status** field are: Annulled, Common Law, Divorced, Married, Other, Separated, and Unmarried. If you choose **Other**, you should also add an explanation in the **Notes** field of the marriage. You can also add additional status words to the list.

If you have recorded an ending **Status** and there is a date associated with it, enter the date in the **Status Date** field.

The screenshot shows the 'Marriage/Relationship Information' window for 'Asa Clark Brown [1] (age 39) and Eleanor Huffman [34] (age 29)'. The 'General' tab is active, showing fields for 'Marr Date' (9 Mar 1832), 'in' (Tonesta, Venango, Pennsylvania, United S), 'Status' (blank), 'Status Date (optional)', and 'User ID'. There is an 'Events/Facts' table with columns 'Event/Fact', 'Date', and 'Desc/Place/notes'. Below the table are 'Married Names' fields for 'Husband's married name' (Asa Clark /Brown/) and 'Wife's married name' (Eleanor /Brown/). At the bottom, there are checkboxes for 'Anniversary Reminder' and 'Private', and buttons for 'Edit Asa' and 'Edit Eleanor'.


Did Not Marry

If the couple did not get married, put a checkmark in the **This couple did not marry** box. When this box is checked, Legacy uses different wording to describe the relationship in reports and web pages. The wording for narrative paragraphs is shown on the **Wording Options** tab. You can override this wording if you want to. See **Wording Options** below.

Had No Children

If you wish to indicate that this couple had no children, click the **This Couple Had No Children** checkbox. Legacy will display “** Had No Children **” in the *Child List* on the *Family View* for this couple. (If you have already entered children for this couple, this option is disabled and not available.)


Monitor Potential Problems

Legacy taps into its problem checking routines while displaying information on this screen. When problems are found, a Problems icon  is displayed next to the piece of information causing the problem. Hovering over these icons shows you a short description of the problem. Clicking on the icon displays a list of the problems and how to fix them.

The Marriage Information Toolbar

The following buttons are found on the toolbar:


Notes

To add explanations or comments about the marriage, click the **Notes**  icon.




(Help index: **Notes**)

Pictures

To add a picture to the marriage, click the **Media Gallery**  icon. (See *Adding Pictures* on page 243 for more information.)


Sources of Information

To document where the marriage information came from, click the **Sources**  icon. (See *Citing Your Sources* on page 71 for more information.)



(Help index: **Source citations**)

Address

To enter the address of the marriage place, click the **Address**  icon.



(Help index: **Address > Add**)

Dates From the Calendar


You can use the built-in pop-up calendar to help you with the Marriage Date field.

Just click the **Calendar**  icon.



(Help index: **Calendar**)

LDS Information

If you are recording LDS ordinance information, click the **Temple**  icon to display the *LDS Ordinance Information* screen where you can fill in the *Sealed to Spouse* date and *Temple* name, if known.



(Help index: **LDS ordinance information**)

Source Clipboard

The *Source Clipboard* is a feature in Legacy that can tremendously increase the efficiency with which you document the sources of the information you enter into your family file. (See *Source Clipboard* on page 88 for information on how and why to use this feature.)



(Help index: **Source clipboard**)

Events

You can attach any number of events to any marriage record. Marriage events in Legacy are facts about the couple's life. Legacy comes with a set of predefined events you can use, and provides the ability to add new event definitions (or modify the predefined ones).

An event record consists of an event name, a description of the event, the date and place of the event, and a comment. Only the event's name is required, but the entry would probably seem meaningless without further data. The ***Deluxe Edition*** of

Legacy automatically creates sentences based on the data, formatted according to the event's definition, for any reports you create.

Adding a New Event

To add a new event to a marriage:

1. Click **Add** to the right of the *Events* box to display the *Add A New Event* window.
2. To select an event from the *Master Event Definition List*, either type the name of the event in the *Event* field or click the **DOWN ARROW** to the right of the field to scroll through the list and select an event by clicking on it. (If you want to define a new event that is not already in the *Master Event Definition List*, see **Editing The Master Event Definition List** below.)
3. In the *Date* field, enter the date the event occurred.
4. In the *Place* field, enter the location where the event took place.
5. In the *Comments* field, enter any information you want to record concerning this event.
6. Click the **Source** icon to record the source of this information if you have it.

Shared Events

A shared event has an owner and one or more witnesses. The term witness might also be described as participants - in other words, someone who had some connection to the event. Witnesses have roles in the event. The event is first entered for the owner - the person who is the primary participant in the event. For a Baptism event for example, the owner would be the person who was baptized. For a Census event, usually the owner would be the head of household. If your ancestor happened to be the first cousin of the head of household and she was temporarily living with the family during the time in which the census was taken, you would probably want to list her as the owner of the event. If you are creating a marriage event, there are two owners, the husband and the wife.

To Create a New Shared Event

1. Create the event for the owner. (See Adding an Event above for detailed instructions.)
2. Before clicking the **Save** button to save the event, click the **Share Event** button. The *People Who Share This Event* window is displayed. (If you have already saved an event, then highlight the event you want to share in the *Events/Facts* window and then click the **Share** button.)
3. From the *People Who Share This Event* window click the **Add Person** button and then choose **Add a name from the name list** from the submenu. The *Name List* appears.
4. Highlight the person you want to share the event with and click **Select**. The *Share Event With Another Person* window is displayed.

5. Enter the **Role** that this person played in the event.
6. Enter any notes or comments you want to make.
7. Repeat the process of adding additional persons by clicking the **Add Person** button again.

Sharing an Existing Event


You can also add witnesses or participants to events you have already added to a marriage . From a couple's *Marriage* screen, highlight the event you want to share in the *Events/Facts* window and then click the **Share** button. The *People Who Share This Event* window is displayed with the current person shown as the only person in the list so far. Now you can follow the same steps described above (from step 3).

Editing an Event

To change the name, date, location or comments of an existing event:

1. Highlight the event line you want to edit in the event list.
2. Click **Edit** to the right of the list to display the *Edit An Event* window.
3. Make the desired changes and click **OK** to save them.

Editing the Master Event Definition List

If you would like to add or edit an event name definition in the *Master Event Definition List* or remove an existing event from the list, click the  icon to the right of the **Event** field on the *Add Event* window to display the *Master Event Definition List*.

To add a new event to the list:

1. Click **Add** to the right of the event list. The **Add/Edit Event Definition** window is displayed.
2. Enter the name and sentence definition of the new event and click **Save**.
3. Click **Close** to return to the *Edit An Event* window.

To remove an event from the list:

1. Highlight the name of the event you want to erase.
2. Click **Options** and choose **Delete** from the shortcut menu. If the event is not being used in any individual's event list, the event is removed from the list. If the event is currently being referenced, a message displays and the event is not removed. You must remove all references to a particular event before it can be removed from the *Master Event Definition List*.

To remove the reference of an event from the current marriage:

1. On the *Information* window, highlight the name of the event you want to delete.
2. Click **Delete** to the right of the event box.

Sorting the Event List

You can have Legacy automatically sort your list of events by the event name or date by clicking **Sort** to the right of the event list. When sorting, any events that don't have a name or date are moved to the top of the list.

To change the display order of the events:

1. Highlight the event line you want to move.
2. Click on the **UP** or **DOWN** arrow in the lower right corner of the *Facts and Events* box (labeled "Set Order") in the direction you want to move the line.

Combining Event Names

If you find that you have two event names that you want to combine, (for example, if you misspell a name), this can easily be done:

1. Highlight the event name you want to change.
2. Click **Map Highlighted Event Name to Another Event Name in List** at the bottom of the window.
3. Highlight the Event name you want to change it to.
4. Click the same button again, which will now read, **Highlight Destination Event Name, Then Press This Button**.

Privacy Settings for Marriages

All reports, data exports and web pages created by Legacy have an option to exclude Private marriages, effectively hiding this information from public view. Click on the **Private** checkbox at the bottom of the screen to mark this as a Private marriage.

Married Names

When a couple is married, in most cases one or both of the individuals involved change their names. This is usually the wife but in some cases the husband's name will change. If you have a marriage name rule selected in the combo box at the bottom of the *Married Names* box, Legacy automatically makes the married name changes and displays them in the **Husband's married name** and **Wife's married name** fields. If you have selected **None - don't generate married names**, the fields remain blank.

You can change the married name for either the husband or the wife by clicking the **Change** button to the right of the married name field.

Married names can be included in the *Name List* and on the *Index View*. They are also used when searching and when generating anniversary calendars.

When you select a different married name rule from the combo box, Legacy asks, **Do you want this change to be the default for all future marriages that you add?** If you answer **Yes**, then any marriage you add from then on will generate married names according to that rule - until you change it again. If you answer **No**, then the rule is only applied to the current marriage

You can also set the default married name rule on the **Options > Customize > Data Entry** tab.

Anniversary Reminder

If you would like to be reminded of the anniversary of this couple a few days before it happens, put a checkmark in the **Anniversary Reminder** option in the lower-middle of the window. The reminder will be displayed on the **Legacy Home** tab.

Tags

You can tag individuals and marriages to mark them for various reasons. (To use the tagging feature in Legacy you must have the tagging option turned on. This is done on the **General** tab of the **Options > Customize** screen.)

Wording Options Tab

Family View Labels

Choose the labels you would like to use when displaying this marriage couple. The default labels are **Husband** and **Wife**.

Default Report Phrases for a First Marriage

The traditional (and Legacy's default) wording on reports and web pages is "married". **John married Sarah...**, or **Sarah married John...** If you have set the 'did not marry' option for this couple, Legacy changes the default wording to "had a relationship with". **John had a relationship with Sarah...**

You can change the defaults to anything you like on the **Options > Customize > View > Default Family View Labels and Report Wording** box.) That option affects every report and web page you create.

If you want to change the wording for this couple only, type a new word or phrase into the box. For example, entering "moved in with" in the box yields the phrase "John moved in with Sarah." Keep in mind that this is just the beginning of the sentence Legacy builds: date and place information (if available) gets added as well. So, in this example, the full sentence might become **John moved in with Sarah on 12 Dec 1888 in London, England...**

Also note that this wording applies to both partners. That is, in our example, Legacy will generate both "**John moved in with Sarah**" and "**Sarah moved in with John**". So, if you changed the phrase to, say, "**married his college sweetheart**" the sentence will become "**John married his college sweetheart Sarah**" -- but it will also

become "**Sarah married her college sweetheart John**". See the next section, on Overrides, for a way around this.

Overriding the Report Phrases

If you would like to completely change the narrative wording that Legacy normally uses to construct a sentence for a report, you can change it to anything you want to. Whereas the default wording above automatically inserts the first name of each of the spouses/partners, these new override phrases does not. You must include the names in the phrase. This gives you the option to modify the names and to change the order of the parts. **Johnny took Sarah as his wife ...** or **Johnny and Sarah got married ...** or **John married his high school sweetheart Sarah** Again, this is the beginning portion of a sentence that will have the date and location added to it, so keep this in mind.

You must construct two versions of the sentence, one describing the husband's first marriage (or partnership) and the other describing the wife's first marriage.

Default Report Phrases if this isn't the First Marriage

Similar to the wording for a first marriage, the default phrase used for a second or later marriage is "**next married**" or "**next had a relationship with**". **John next married Sarah...**, or **Sarah next had a relationship with John...** If you want to change the phrase for this subsequent marriage/partnership only, you can type a new phrase into the box.

Overriding the Report Phrases

Just as with the first marriage, you can enter your own wording for later marriages. **Later in his life Johnny got remarried to Ruth ...** or **Several years after her divorce, Sarah met a man named Alfred and they were married** Again, this is the beginning portion of a sentence that will have the date and location added to it, so don't put a period at the end.

Again, as with the first marriage, you must construct two versions of the sentence.

Other word substitutes

You can also change the terms **Spouse** and **Marriage** to other words that will be used in various reporting situations.

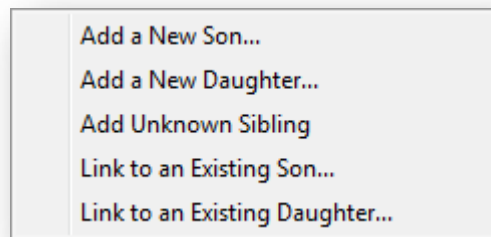
Adding Children

Each marriage can have up to 60 children. The children are displayed in the *Children* list in one, two, or three columns. (You can change the setting by right-clicking on a child's name, moving down to **View** and then choosing **1, 2, 3** columns or **Best Fit**.)

Children are generally added from the *Family View* although they can also be added from the *Pedigree*, *Descendant*, and *Index Views* by right-clicking on a name and choosing the **Add** option.

To add a child from the Family View:

Click on any cell in the *Children* section near the bottom of the screen. If there are no empty cells (meaning all the cells are filled), there will be a plus sign **+** in the upper-right corner of the section that can be clicked to add a new child. Using either method displays a popup menu:



Choose **Add a New Son** or **Add a New Daughter**. This opens the *Information* screen where you can enter the data.


Editing the Child-Parent Links

As you enter children for a mother and father, they are automatically sorted into chronological order as long as there is a birth date available (unless you have turned off the auto-sorting option. Oftentimes, a child with no birth date is entered and you will want to place the child in a specific order within the other children.

You can also assign a Status to a child, such as Twin or Stillborn.

Usually the relationship between a child and his or her parents is “Biological.” Sometimes, however, there may be a different relationship such as “Adopted,” “Foster,” or “Sealed.” There might be a different relationship between the child and the mother and the child and the father. Perhaps the father adopted the child after marrying the mother.

The above situations can all be added and edited from the *Edit Children* screen.

To reach the *Edit Children list*, right-click on a child's name from either the *Family* or *Pedigree View* and then choose **Children's Settings** or click the  icon in the upper-right corner of the *Children* section of the Family View.

Changing the Sequence of Children

The initial sequence of the children in the child list is set by the order in which they were entered. If you want to change this order, highlight the child whose name you want to move and then use the **up** and **down** Order arrows in the lower right corner to move the name within the list.

Setting a Child to "Preferred"

The "preferred" child is generally the child in your direct line and is indicated by an asterisk in the left column of the grid. Knowing who the preferred child is makes it much easier to move down your line from one descendant to the next.

You can change the preferred child by highlighting the desired name and clicking **Set to Preferred Child** in the lower left corner of the window. The asterisk in the left column of the grid then moves to the new child's name. **Note**, the preferred child for a whole branch of a family can be set by using **Tools > Set Direct Line**.

What are Those Characters?

An asterisk (*) in the left-hand "P" column indicates that the individual is the **Preferred** child. There is also an option to show the preferred child's name in bold print.

A plus sign (+) in the left-hand "P" column indicates that the individual is set as a **Direct Line** person.

An asterisk (*) before a date in the Birth Date column indicates that the date was taken from the christening (baptism) field because there was no date in the Birth field.

Sorting the List

If you would like to sort the list in ascending order by the birth dates of the children, click **Sort**.

Child Status

You can tag each child with a special status if you like. These include **Twin** and **Stillborn**. The default setting when a child is first added to the list is None. To set a new status, highlight the child and then click the **Down Arrow** on the *Child Status* drop-down list at the bottom center. Select the new status by clicking on it. You are not limited to the statuses in the list. To add a new status, just enter it into the field.


Relationship to Father and Mother

You can specify the relation of each child to the father and the mother. These relationships can be things like **Adopted**, **Foster**, or **Sealed**. They can even be things like **Unproven** or **Disproven**. The relationships can be specified differently for the father and mother. Perhaps the father is the **biological** parent and the mother is an **adoptive** parent. The default setting is **Biological** which is shown as a blank. To set a new parent relationship, highlight the child and then click the **down arrow** on the **Relationship to Father** or **Relationship to Mother** field. The *Master Child-Parent Relationship List* appears. Select the relationship by clicking on it. You are not limited to the relationships in the list. To add a new relationship, just enter it into the appropriate field box.

Private and Invisible Relationships

You can mark the **Relationship to Father** or the **Relationship to Mother** as **Private** or **Invisible** by putting a checkmark in the **Private** or **Invisible** option to the right of the appropriate relationship status. A **Private** setting causes the relation to not be mentioned on reports or web pages. An **Invisible** setting treats the relationship as non-existent on reports and web pages. It is as if the child and parent are not linked together. For example, you might have a **Biological** relationship between a child and a father that you don't want to publicize or even acknowledge.

Adding Sources

You can add source documentation to the Child Status, Relationship to Father, and Relationship to Mother fields. To do this, click the **Sources** icon . If the icon is colored it means that at least some of the information has been documented.

Editing a Child's Information

You can edit the individual information for any child in the list by highlighting the name and clicking **Edit**. The Information screen appears where you can make changes.

Adding a Brother or Sister to the List

You can add an additional brother or sister to the Child List by clicking either **Add Brother** or **Add Sister**. The Add window appears where you can choose to **Add a NEW Person** or **Link to an EXISTING Person**.

Unlinking a Child

To unlink a child from the list, highlight the name and click **Unlink**.

Deleting a Child

To delete a child from the list, highlight the name and click **Delete**.


Using the Hint System

Constantly Looking for New Information in the Background

Legacy Hints (Deluxe Edition)

How Does the Hinting System Work?

Legacy has a powerful background Internet search engine that searches through billions of records from several key websites including **MyHeritage**, **FindMyPast**, **FamilySearch**, and **GenealogyBank**, looking for new information, pictures, newspaper articles, family trees, stories, and other information about your ancestors. When things

are found (we call them **Hints**), a small Hints icon  is displayed next to the name for which they apply. The icon displays how many hints have been found. (If more than 9 hints are found, the icon will show **9+**.) This is all done in the background while you are using Legacy. If you hover your mouse over the icon, a quick summary of the number of hints and where they were found is shown in a popup tooltip.

Note: When using the **FamilySearch** service, hint will only be returned for individuals in your family file who have been linked to someone in the *FamilySearch Tree* – or if you have found the FamilySearch ID number and have entered it into the **FamilySearch ID** field on the *Individual Information* screen for an individual.

Setting up the Hint System

► To Turn on Hints:

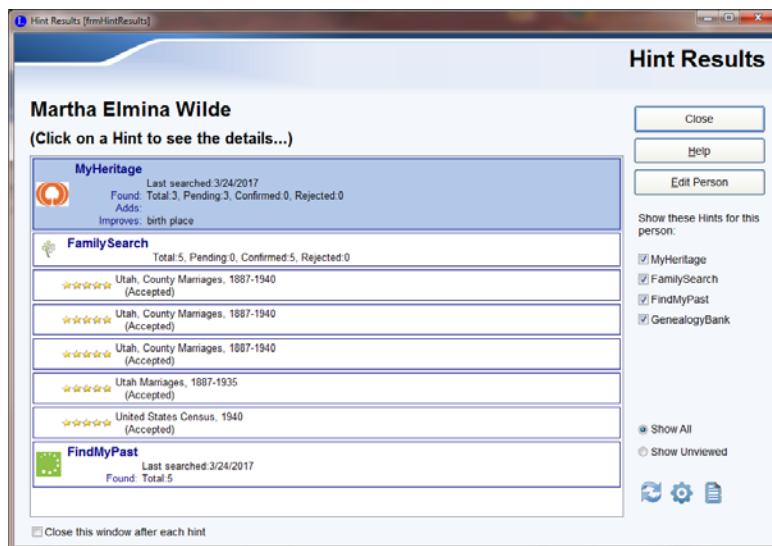
1. From the **Options** tab on the Ribbon Bar, choose the **Customize** button.
2. On the *Customize Legacy* screen, click **8. View** in the menu on the left.
3. Scroll down in the *View Settings* section on the right to section **8.13 Perform Background Legacy Hints**.
4. Click on the **Select Background Hints** button. This displays the *Legacy Hints* screen where you can choose the particular hint services you want to use.
5. To turn on a service, select the checkbox to the left of its name.
6. Some of the services have options you can set for how they return results. (You can click the Help button for detailed information about these options.)
7. When you have selected the desired hint services, click **Save**.
8. Back on the *Customize Legacy* screen, select the **Show Hint result icons in Legacy** checkbox.

That's all there is to it. When you click **Save** to exit the *Customize Legacy* screen, hints will start to be collected in the background and displayed on the screen as you navigate around your family file. Only the names showing on the *Family* or *Pedigree Views* are submitted for hints. As you navigate around your file on these two views, all the newly

displayed names are added to the hint search list and hint icons will start showing up for them too. Hint icons only show up for people for which hints have been found.

How to Use the Hints

After you have started *Legacy Hints*, hint icons will start showing up next to the names on the *Family* and *Pedigree Views*. They can also optionally be shown on the *Descendant* and *Index Views*, and the *Name List*. **This, of course, requires that you have an active Internet connection in order to collect the hints.** (Remember, you must be using Windows 7 or higher.) When a Hint icon appears, you can hover your mouse cursor over it to see what kind of hints were found and how many. If you click on the icon, the *Hint Results* screen appears showing what has been found.



Each of the hint services in the list displays how many hints were found and when the last search was done. By default, particular hints are only refreshed every 120 days.

To view the hints found for a service, click on the desired box in the list. This opens a window in your browser, navigates to the services website, and displays a list of the hints. You can then use their webpage to display each individual hint and the information it contains.



(For more information on this topic, look in the Legacy Help index for: **Hint, Results**)

Chapter 5

Sources

Creating Perfect Source Citations

Citing Your Sources

When you do family history research, you should keep track of each piece of information you collect and also where you found it. Your records should be detailed enough so that any other person in the future could find the same information.

As you add individuals and families to the family file, you can either document the sources of the information as you go, or you can return later and add the documentation. Of course, by putting things off, you tend to forget about them, so it is strongly suggested that you resist the urge to save time and go ahead with documenting your sources as you initially enter the names.

A particular source of information may be cited hundreds of times within a family file. You might find a book or census that contains scores of family members. The location of each piece of information for each individual should be recorded. Rather than record the entire source description dozens (or hundreds) of times, taking up huge amounts of storage space, it is much more efficient to enter a general source description once, point to it in a master list, and record just the unique information for each piece's place within that source.

Assigned Sources Window

Displaying the *Assigned Sources* screen can be done by clicking the **Source**



icon on either the *Individual* or *Marriage Information* window, or with one of the **Source** buttons on the *Family View* or *Pedigree View* screen. **Note:** If you click from the *Marriage*

Events	Source List Name	Detail	V
Name	-Minnesota, Hennepin County - 1860 - U.S. census	town of Richfield, 5	<input type="checkbox"/>
	-Minnesota - Death Certificates	death certificate, 2:	<input type="checkbox"/>
-AKA: Clark	-Letter - from Mabel Hilton to Virginia Larsen - 9 Octob		<input type="checkbox"/>
Birth	-Minnesota, Hennepin County - 1860 - U.S. census	town of Richfield, 5	<input type="checkbox"/>
	-Brown - Asa Clark Brown Family Bible		<input type="checkbox"/>
	-Connecticut, Windham County, Woodstock - 1686-1: 197		<input type="checkbox"/>
	-Connecticut, Windham County, Woodstock - 1686-1: 81, Asa Brown, 13:		<input type="checkbox"/>
	-Minnesota, Hennepin County, Minneapolis - 1853-192 Asa C. Brown inde		<input type="checkbox"/>
Christening			<input type="checkbox"/>
Death	-Letter - from Mabel Hilton to Virginia Larsen - 9 Octob		<input type="checkbox"/>
	-Brown - Asa Clark Brown Family Bible		<input checked="" type="checkbox"/>
Burial	-Minnesota, Hennepin County, Minneapolis - 1853-192 Asa C. Brown inde		<input type="checkbox"/>
Notes			<input type="checkbox"/>
Research			<input type="checkbox"/>

Death: 8 Mar 1866, Minneapolis, Hennepin, Minnesota, United States Show all Events

Output | Text/Comments | Repository | Media Show Source using Print Options

Footnote/Endnote Citation:
Brown Bible Records, 1792-1914. *The Holy Bible* (Hartford, Connecticut, 1850), privately held by Geoff Rasmussen, [ADDRESS FOR PRIVATE USE], El Mirage, AZ, 2008.

Subsequent Citation:
Brown Bible Records, 1792-1914.

Bibliography:
Brown Bible Records, 1792-1914. *The Holy Bible*. Hartford, Connecticut, 1850. Privately held by Geoff Rasmussen, [ADDRESS FOR PRIVATE USE], El Mirage, AZ, 2008.

Information screen you only see the sources related to the marriage, not the entire *Assigned Sources* screen.

The *Assigned Sources* window contains three columns: **Events**, **Source List Name**, and **Detail**.

Events Event names in the left column are taken from the data headings on the individual or marriage information sheets. As sources are added, they are assigned to a particular event name. Multiple sources can be assigned to the same event title.

Source List Name When a source is assigned to a specific event, the field then shows the name of the source or sources that have been assigned. There is also a category named **Unspecified**. This is a catch-all category where data can be assigned when specific sources are not available.

Detail Data in the *Detail* field shows the information entered in the *Source Detail* window shown below.



(For much more information on this topic, look in the Legacy Help index for: **assigning sources to your information**)

SourceWriter™ Template System

Version 7 of Legacy heralded the introduction of *SourceWriter*. *SourceWriter* is a template driven sourcing system that makes it easy for you to select the correct input screen so that you enter all the pieces needed to correctly cite any source of information in the thousands of formats that exist for them. The information you enter is correctly and precisely formatted to match the genealogy industry standards for source citations.

Prior to version 7, Legacy's citation methods were rather basic and required more understanding of sourcing to produce correct citations. Actually, starting in version 7, you can use either of the citation methods, the new or the old. We will call the new system *SourceWriter* and the previous system the "Basic System." If you always want to use the old system, go to **Options > Customize > Sources** and select the **Basic Source System**. To use the new *SourceWriter* system, make sure the option is set to **SourceWriter System**.

Adding a New Source Using SourceWriter

There are several ways to reach the *Add a New Master Source* screen:

- From the **Assigned Sources List** from an **Individual, Marriage**, or **To-Do** screen, click the **Sources** icon and then select **Add a New Source**.
- From **View > Master Lists > Source**, click the **Add** button.

1 Add a New Master Source

Step 1. Add a New Master Source. using SourceWriter

Cancel
Help

What kind of source do you want to cite?:

Search

OR choose the type of source from this list:

Journals	1) Select the type of land/property record:	Deeds & conveyances	Go to Step 2
Land & Property records	2) Where were these records recorded?	Recorded at local/county/district level	
Letters	3) Select the type of deed/conveyance:	Deed Books	
Lineage-Society materials	4) Select the medium:	Microfilm/fiche	
Magazines			
Mailing List			
Maps			
Marriage records			
Medical records			
Membership organization records			

OR select one of your bookmarked source types:

Go to Step 2

Create a bookmark for the selected source type Delete Bookmark

Choosing a Source Template

The first step is to select the proper source template that matches the source you are documenting. A source template is made up of all the potential pieces of information that you should record about the source. These include both the fields for the master source and the fields for the details of the citation. Some sources require only a few bits of information and others require many.

There are two different ways to find the source template that you want to use. The first is by entering keywords to display the *Source Template Index* showing you all the templates that match your query. From there, you select the template that matches the source you are entering. The second method is to select the template by first selecting the general type of source and then choosing subcategories that refine the choice down further and further until you have the desired template that matches the source. These two methods are described in detail below.

Selecting by Keyword(s)

What kind of source do you want to cite?:

Begin by entering one or more keywords into the field and then click the **Search** button. This then displays the *Source Template Index* showing you all the templates that match your keywords. For example, if you entered **book authored**, the *Source Template Index* would show you a list of about 100 templates. These would be grouped into four sections; **Audio book, Book, CD, and DVD**. It would be fairly straightforward to then select the actual book type that you are dealing with. If you knew that you were citing a source from a basic printed book, you could have entered the keywords, **book authored basic**, the resulting index list would have only contained 12 templates. As you use the *Source Index* more and more, you will get better and better at selecting the desired keywords that will make the template selection go more quickly.

Note: The SourceWriter templates are a complete implementation of Elizabeth Shown Mills' Evidence Explained book. If you have the book and want to use one of the templates, you can enter the template number into the Keyword field to instantly select it.

Filtering the Source Index List – There is an option at the bottom of the *Source Template Index* called, **Filter the list when searching**. Selecting this option cause the list to only show the templates that match all of your keywords. With the option unchecked, the list will include the entire index with the first template that matches your keywords highlighted. You can then use **F3** to jump from matching template to matching template down through the list. (**Shift-F3** jumps backwards up the list.)

Changing the Keywords

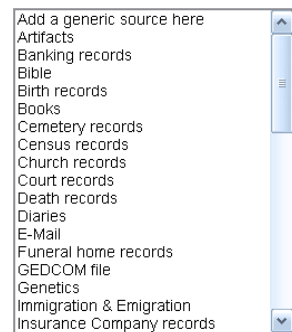
You can add or remove keywords from the search field at the top and then click the **Search** button to create a new list of matches.

Choosing the Template from the List

When you find the correct template, click on it to highlight it and then click the **Go** button. (Or you can simply double-click the template line.) You are then taken to the screen where you actually enter your source information into the template fields. See **Filling in the Source Template** below for more information.


Selecting a Template by Type

Selecting a template by type is a multi-step process. Begin by selecting the desired type from the list box on the left. When you have clicked on the type you want to select, you may be prompted



for subcategory types to narrow the choice for the final template you should use. Some types require up to four subcategories, others don't require any. For example, if you selected the **Books** type of source, the next prompt would be:

1) Was the book authored or edited?

Click on the down arrow  to display the possible choices:


1) Was the book authored or edited?

Choose the appropriate subcategory. For example, **Book, authored**. The next prompt would be:

2) Select the type of author:

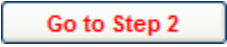
Selecting **Author known** would then bring up the final prompt:


3) Select the medium:

As soon as you have answered the last prompt in the series, the  button is enabled so that you can click it to continue on to the actual source template. See **Filling in the Source Template** below for more information.

Bookmarks

After you have cited many sources in your family file you may find that you are using one or more of the same templates on a regular basis. For example, many people cite a basic format authored book many times. A certain type of cemetery record or federal census found online may also be a popular choice. When you find a particular template that you are using over and over again, you can save a bookmark for it so that you can easily and quickly select it again in the future.


To save a bookmark, first make all your type and subcategory selections until the  is enabled. But before you click it, click on the **Create a bookmark for the selected source** link at the bottom of the screen. Legacy saves the template in the *Bookmark List*:



Birth records > Birth certificate > Held at local/county level > Original
Books > Book, authored > Author known > Basic format
Church records > Certificates > Online database

Create a bookmark for the selected source **Delete Bookmark**

To select and use one of your bookmarks, click on the desired bookmark to highlight it and

then click the  button to the right of the *Bookmark List* to continue on to the actual source template. See **Filling in the Source Template** below for more information.

To delete a bookmark, highlight it and then click the **Delete Bookmark** link.

Filling in the Source Template

The second step to adding a new source using *SourceWriter* is to fill in the actual fields of the template for the master source. Here is a typical master source template for an online census record:

Add a New Master Source

Step 2. Fill in the fields below.

You selected: **Census records > United States > Federal census records > 1820 population schedule > Online images**

[Click here to select a different source template.](#)

Source Info | Text/Comments | Repository | Media | Override

Source List Name (name to display in master source list):

B
I
U
x²

Jurisdiction State:

Jurisdiction County:

Census ID:

Census Schedule:

Website Title:

URL:

Publish Date:

Publisher:

Series:

Format:

Verified **Recorded Date:** **File ID:**

Tag Exclude from reports

Output Preview:

Footnote/Endnote Citation:
 1820 U.S. census population schedule; digital images; citing National Archives and Records Administration microfilm M33.

Subsequent Citation:
 1820 U.S. census population schedule.

Bibliography:
 1820 U.S. census, population schedule. Digital images. n.d.

Save
 Cancel
 Options
 Help

The name of the source template that you have selected is shown in the header. In this example it is: **Census records > United States > Federal census records > 1820 population schedule > Online images**. It is a long name but it precisely identifies the template type and subcategories. Many names are shorter, some are longer.

Below the header is the actual template. The first tab, **Source Info**, contains the fields that you will be filling in. The other three tabs, **Text**, **Repository**, and **Multimedia** are included so that you can add additional information about the source as well as pictures and other items of interest.

To the right of the input section is the **Output Preview**. As you enter the information about the source, it is instantly processed and displayed in three different formats so that you can see how it will look when included on a report, book, or webpage. The **Footnote/Endnote Citation** output is used for the first occurrence of a footnote (at the bottom of each page where a source is cited) or endnote (at the end of each generation, chapter, or book) on a

report. The **Subsequent Citation** is used in the same places as the footnotes and endnotes but uses a condensed format that doesn't require as much room. The **Bibliography** is printed at the end of a report and is a summary of all the master sources cited in the report and is shown in alphabetical order.

The Parts of the Source Info Tab

Field Examples – Most input fields have some kind of instruction or example in grey lettering centered in the field. This text gives you a sense of what the field is for. When you click in a field (or tab to it), the example text disappears so that you can enter your information. **Note:** The example text is also shown as a tool tip when the mouse pointer is held over the field label so that you can remember what the example was when you are filling in the field.

Default Entries – Some fields have default entries. In most cases, this is what should remain in the field. You can replace it if needed.

Locked Fields – Some fields have default text and are locked so that you cannot change the contents. They are actually part of the source citation output and are only shown so that you will know what part of the citation they are.

Scrolling – If there are more than ten input field, a scrollbar is shown allowing you to manually scroll up and down in the field list. When you are entering information and tabbing down the list, it scrolls automatically for you.

Filling in the Source Template Fields

Master Source List Name – Enter a name for the master source record. This name will be used in the *Master Source List* whenever it is displayed. It is not part of the source citation output. The source name is generally an abbreviation of the source title. For example, if you are working from a book called "**Gilbert Radcliff Johnson of Wilderberry County, South Dakota and all Known Descendants Through 1945**", you might want to name the source something like "**G.R. Johnson Descendants.**" You might also want to begin the source name with the type of source, place, or surname. (Examples of each of these can be seen in the Sample family file included in the Legacy installation.)


Template Fields – Tab from field to field and fill in the information you have about the source. Locked fields with default text are skipped while tabbing. When the cursor enters a field, the example text disappears. (Again, you can see the example text as a tool tip when the cursor is held over the field label so that you can remember what the example was when you are filling in the field.)

Text Tab – Here you can record actual source text and comments about the source. The text box can be a word-for-word copy of any description contained in the source. Don't enter opinions about the source by you or the compiler. This should only include "what the original record keeper said" as opposed to any interpretations. The Comments box is used to record notes for each master source you enter. This is a good way to document how you found a particular source and other interesting and important information about it.

Embedding Formatting Codes into the Notes – You can add formatting codes to your source text and comments so that portions print in bold, italics, underline and superscript. These codes are used when printing reports, producing word processing files and Web pages.

Repository Tab – Record the name and address of the place where this source is stored. It may be a cemetery, library, or archive. It can even be the address of another person who has a copy of the document.

Media Tab – Used to attach graphic files and other files to the source. These may be scanned images such as birth certificates, obituaries, sound files, etc.

Override Tab – You can override any of the automatically formatted Bibliography output that *SourceWriter* produces. You can pre-fill the Bibliography override section by clicking on the  button to its right. You can change the output to anything you want. To actually override the default output, you must also checkmark the option just below the Bibliography section. **Note:** Overriding of the *Citation* and *Subsequent Citation* output can be done from the *Source Detail* screen.

Other Options

Below the tabbed sections of the template are two more fields and three options:


Recorded Date

This is the date you recorded the source citation.

File ID

You can assign your own filing number if desired.

File ID Assistant – To help you figure out the next available file ID number, click the

Assistant button . (See **File ID Number Assistant** on page 277 for more information.)

Verified – This checkbox is used when you have verified the source information. For example, if you receive information from another person, either through a GEDCOM import or by email or other means, you should verify that the source citations are true and accurate. As you check each citation, you can mark **Verified** to indicate your confirmation of the source information. **Note:** How you use the Verified field is up to you. You can also use the Surety Level and Source Quality Analysis features to record whether the information itself checks out. These are described down in the Source Detail section.

Tag – Sources can be marked with a tag so that later you have the option to print only the tagged sources when doing a source report.

Exclude from reports – Select this option to exclude this source from the footnotes, endnotes, and bibliographies when printing reports or books. Normally you will only want to print a few of your best and most reliable sources for each event on a report or book. You might have a dozen or more sources for a person's name, for example, but it doesn't make sense to include all of them on a report. The resulting footnotes end up very long and take too much space at the bottom of each page.

Other Options

In the header at the top of the screen there is an **Options** button. From here you can set the Font size used for the *Output Preview* by using the **Zoom** option. You can also save a bookmark for the current template so that you can easily use it in the future. See **Bookmarks** a few pages back.

Selecting a Different Template

If you are adding a new source (as opposed to editing an existing source) you can go back to Step 1 and select a different template if you wish by clicking the **Click here to select a different source template** link in the header section.

Saving the Source

To save the source, click **Save**. If you are adding a citation, you will be taken next to the Detail screen where you can enter additional information pertaining to the particular citation of the source that you are making. This is usually a page number, item number, etc.

Recording the Details

The third step in adding a source citation is to fill in the detail information. A particular master source of information may be cited an unlimited number of times within a Family File. You might have found a book or bible that contains hundreds of family members. The location of each piece of information for each individual should be recorded. Rather than record the entire source description hundreds (or thousands) of times, taking up huge amounts of storage space, it is much more efficient to enter a general source description once, point to

it in the master source list and record just the unique information for each piece's place within that source.

The *Source Detail* window is where you enter information about a source that indicates where in a specific source the cited information was found. Most source templates contain additional detail fields, that when filled in, are incorporated into the final output of the footnotes or endnotes. A typical *Source Detail* screen might look like this:

Detail Fields – Enter the requested information if you know it. These is usually page numbers, volume numbers, item numbers of a microfilm rolls, line numbers, etc.

Surety Level – While specifying the source detail, you can also indicate the *Surety Level* of the information. This number, from zero to four, shows how sure you are of the information.

0 indicates that you have not yet made up your mind about how convincing this source of information is.

1 indicates that there is a little evidence to support this fact but it is not too convincing.

2 indicates that this is probably a true fact. You don't have any reason to doubt it but there is no other evidence that backs it up.

3 indicates that this is almost certainly a reliable source with factual information.

4 indicates that you are as sure as you can be about this piece of information. There are multiple sources supporting this fact, or you know someone who was there, or you were there yourself. You are convinced that it is true.

Source Quality Analysis – Pressing this button displays the *Source Quality* screen. The basic principle is explained by Elizabeth Shown Mills in her *Evidence Explained* book:

SOURCES provide INFORMATION from which we select EVIDENCE for ANALYSIS. A sound CONCLUSION may then be considered “PROOF.”

SOURCE

Select whether this source is an **Original** or a **Derivative** of the original. Or choose **I don't know** if you are not sure.

INFORMATION

Select **Primary** if the information in the source was provided by someone with firsthand knowledge, or **Secondary** if the information is secondhand. Or again, **I don't know** if you are not sure.

EVIDENCE

If the source answers the question you are trying to resolve all by itself, select **Direct**. If the source helps to answer the research question but doesn't do it directly, select **Indirect**. Or, if you can infer an answer to the research question by the lack of information in the source, select **Negative**. Or, if you are not sure, select **I don't know**.

Click **Save** when you are finished.

Recorded Date – This is the date you recorded the source citation.

File ID # – You can assign your own filing number to the citation if desired.

File ID Assistant

To help you figure out the next available file ID number, click the **Assistant** button




. (See **File ID Number Assistant** on page 277 for more information.)

Include this Citation on Reports – By default each citation is marked to be included on reports and webpages. If you would like to exclude this citation, uncheck the **Include this Citation on Reports** option.

Detail Text Tab – Here you can record actual source text and comments about the source pertaining to this citation. The text box can be a word-for-word copy of any description contained in the source. Don't enter opinions about the source by you or the compiler. This should only include "what the original record keeper said" as opposed to any interpretations. The **Comments** box is used to record notes for each source citation you enter. You can also include your opinion of this particular citation or the interpretations of the compiler/indexer etc.

Embedding Formatting Codes into the Notes – You can add formatting codes to your source text and comments so that portions print in bold, italics, underline and superscript. These codes are used when printing reports, producing word processing files and Web pages.

Multimedia Tab – Used to attach graphic files and other files to the source. These may be scanned images such as birth certificates or obituaries, or you can include webpage URLs. Some source templates have space for a URL but it's normal not to link to the specific detail webpage in a source because it is so subject to change – but it makes sense to add some of these to the Media section for quick access to the original.

Overrides Tab – You can override any of the automatically formatted output that *SourceWriter* produces. You can pre-fill each override (Footnote/Endnote Citation, Subsequent Citation) section by clicking on the  button to its right. You can change the output to anything you want. To actually override the default output, you must also checkmark the option just below each section.

Output Preview

To the right of the input section is the **Output Preview**. As you enter the information about the source detail, it is instantly processed and displayed in three different formats so that you can see how it will look when included on a report or book. The **Footnote/Endnote Citation** output is used for the first occurrence of a footnote (at the bottom of each page where a source is cited) or endnote (at the end of each generation, chapter, or book) on a report. The **Subsequent Citation** is used in the same places as the footnotes and endnotes but uses a condensed format that doesn't require as much room. The **Bibliography** is printed at the end of a report and is a summary of all the master sources cited in the report and is shown in alphabetical order.

Verified – This checkbox is used when you have verified the source detail information. For example, if you receive information from another person, either through a GEDCOM import or by email or other means, you should verify that the source citations are true and accurate.

As you check each citation, you can mark **Verified** to indicate your confirmation of the source detail information. (Master Sources also have a **Verified** checkbox for the same reason.) You should be checking to make sure that you (or the person you've imported the source from) has properly read what the source actually says.

Citing an Existing Source Using SourceWriter

- From the **Assigned Sources List** from an **Individual**, **Marriage**, or **To-Do** screen, click **Cite a Master Source**. The *Master Source List* appears.

Master Source List

Select this box to exclude the source on reports.

Select this box when you have verified the source.

Click **Options** to access tagging, combining duplicates, purging, importing, printing, and zooming.

(The output and the options below the list relate to the currently highlighted source in the list.)

What Is Included in the List?

The *Master Source List* shows all the sources being cited by any piece of information in your family file. If a source is referenced from more than one place, only one copy is recorded in the *Master Source List* and all references point to this one master copy. The lines showing in the *Master Source List* are the *Source List Names*. These names are displayed alphabetically. (Remember to choose the Source List Name carefully as you'll be using it to find each Master Source in the future.)

Showing Source Details

Below the *Source List Name* window, the details of the highlighted source are shown. This includes the Output, Text/Comments, Repository, and Pictures associated with the source. As you move the highlight bar up and down in the list, the details for the currently highlighted line are shown.

Selecting a Source

To select a particular master source, highlight the desired line and click **Select**, or double-click on the line.

Tagging a Source

You can tag Individual source lines in the *Master Source List* by either clicking in the *Tag* column of the desired source line, or by clicking the line to highlight it and then clicking the **Tag** checkbox. When a source line is tagged, a check mark appears in the *Tag* column. The tags can be used to limit the included sources when printing a *Source Citation Report*.

Excluding a Source

You can exclude an individual source from reports by either clicking in the *Excl* column of the desired source line in the *Master Source List* or by clicking the line to highlight it and then clicking the **Excl from Reports** checkbox. When a source line is selected for exclusion, a checkmark appears in the *Excl* column.

Adding a New Master Source

► To add a new source:

1. Click **Add**. The *Add a New Master Source* window appears. (For more information on filling in this window, see *Adding a New Source Using SourceWriter* on page 72.)
2. Fill in the source definition.
3. Click **Save**.



(Help index: for Basic-style sources: **Define or Edit a Master Source**)

(Help index: for new SourceWriter sources: **SourceWriter**)

Note: If you want to add a new source that is very similar to one you have already entered, you can edit that existing source and then Save it as a new source.

Editing a Master Source

► To edit an existing source:

1. Highlight the source entry you want to change.

2. Click **Edit**. The *Edit Master Source Definition* window appears.
3. Make the desired changes to the source definition.
4. Click **Save**.

Note: When you edit a master source and then click **Save**, a *Changing...* window appears asking if you would like to **Apply the changes to ALL references of this master source** or **Apply the changes to a NEW copy of this master source**. If you apply the changes to **ALL references**, then every bit of information you linked the source to will show the new edits. If you would like to create a new source with the edits, choose the **NEW copy...** option. This will leave all the other existing references alone and just apply the newly edited version of the source to the current link.

Other Options

The **Options** button brings up a menu where you can choose the following:

Delete Master Source lets you erase a master source from the list. If you try to delete a source that is being used anywhere in your family file, you receive a message to that effect and you are offered the option to view all the records that use it.

► **To remove a master source from the *Master Source List*:**

1. Highlight the source line you want to erase.
2. Click the **Options** button and choose **Delete Master Source** from the popup menu. If the source is not being cited by any record in your family file, the source is removed from the *Master Source List*. If there are one or more records connected to the master source, a message is displayed indicating that the source cannot be deleted because it is in use. The message offers to display a list of the records currently using the source. Click **Yes** and a window with a list of all individuals who use the master source appears. If you still want to delete the master source, click **Delete this Master Source and All Citations to It**.

Tag/Exclude brings up the *Tag/Exclude Option* window where you can quickly set or clear all general source or report exclusion tags.

Change Surety Settings lets you modify the surety level setting of the highlighted master source.

Combine Duplicates combines any sources that are identical in every way.

Purge Unused Sources removes any master sources that are not being cited from anywhere in the entire family file.

Import Lists lets you import various lists from other family files. These include *Locations, Surnames, Event Definitions, Temples, Marriage Status, Source Types, Child Status, Picture Locations*, and other *Master Source Lists*.

Print prints either a list of all the *Master Sources* or a *Source Citation List* that shows every individual and marriage that cites each source.

Zoom lets you vary the font size of the *Source List Name* column.

Options for Non-Sources lets you move information from master sources that doesn't belong there. This usually originates from imported material where other people have entered information that really belongs in a notes field instead of a master source record.

Show List

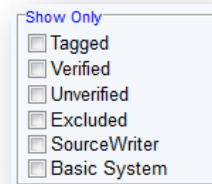
The **Show List** button displays a list of individuals who use the highlighted master source(s).



(Help index: ***Who is using this***)

Show Only

If you would like to filter the *Master Source List* so that only certain sources are showing, you can choose the subset you would like to see by selecting the desired categories from the **Show Only** box. When you want to see all the sources again, uncheck all the options.



Searching for a Specific Source List Name

If your list of master sources is extensive, you may have a need to search the list for a specific entry.

► To search for a source list name:


1. In the **Find** field above the *Source List Name* column, type the text you want to find. This should be the beginning of the source list name. As you type, Legacy displays the closest matching line in the list.

Note: When you have a lot of master sources, you will find that it is very advantageous to adopt some kind of system when naming the sources. Some people use mainly locations, some use source types, some use surnames, or something similar.

Source Clipboard

The *Source Clipboard™* is a feature in Legacy that can tremendously increase the efficiency with which you document the sources of the information you enter into your family file. The *Source Clipboard* holds a copy of the source citation you are currently working from. You can then record the source of each piece of information by simply clicking one button.

Legacy can store up to 10 different Source Clipboards allowing you quick access to each one. You can quickly switch between sources when assigning sources to the details for one or more individuals. Use saved Clipboards when you have two or more individual sources you often use and want a quick way of choosing which is used for each fact or event. (See **Saving a Source Clipboard**, **Loading a Saved Source Clipboard**, and **Quick-Loading a Saved Source Clipboard** at the end of this help topic for more information.

To get to the Source Clipboard, click the  button on any form that contains sourceable information. These include the **Individual** and **Marriage** Information screens, the **Event** screen, the **Children** List, and many others.

You can add or change the citation on the clipboard by clicking the **Set** button. (See *Master Source List* on page 84 for more information.) The clipboard also holds the detailed information about where in the source the current information came from. This is usually a page number, microfilm item number, etc. The actual source text being cited can be entered on the **Text/Comments** tab. You can also set the surety level for the source information as well as set the Source Quality. This reflects your confidence in the accuracy of the information. (See *Recording the Details* on page 80 for more information.) In addition, you can enter a user file number to cross-reference the photocopies, extracts, and documents you find as you research your family.

- ▶ **To exclude a source citation on a report:**
Deselect **Include this Citation on Reports**.
- ▶ **To include the actual source text in citations:**
Select **Add this Text to the Source Citation on Reports** on the **Text/Comments** tab.
- ▶ **To be prompted for the Source Detail each time you use the clipboard:**
Select **Prompt for Detail** at the bottom of the window. This is a convenient way to cite sources that are on many different pages of a document.

Adding Multiple Sources to the Clipboard

The ability to place up to five source citations on the clipboard is optional in Legacy. To do this, click the **Options** button and choose **Allow multiple sources on the clipboard**.

Note: You can also set this option in the 7. Sources section of the *Customize Legacy* screen which is reached by choosing **Customize** from the Options tab on the Ribbon bar. Scroll down to the 7.5 Source Clipboard - Capacity box and select the allowance of only one or up to five sources at a time on the clipboard. (When you paste a source clipboard with multiple sources on it, all the sources (up to five) are added. It doesn't matter which tab is current - all the source on the tabs with the asterisk (*) are pasted.)

When you have entered the current source information, click **Save** to return to the entry form.

Using the Source Clipboard

Perhaps some examples will help to illustrate the value of this feature:


You have just been to the local library and found a book that contains a lot of information about your ancestors. Page 211 of the book contains the following text:

James Michael Martin Sr. was born on the 23rd of December, 1762, in Hackensack, New Jersey. On the 16th of May, 1784, Jim married Sarah Rebecca Gilbert somewhere in rural Bergen County, New Jersey, and they had the following children:





- 1. James Michael Martin Jr.** Born 30 Apr 1785 in Hackensack. He married Ida Fredricks, daughter of Henry R. Fredricks and Millie Andrews, on 25 Dec 1806. Jim Jr. died in 1838 in New York, NY.
- 2. Sarah Martin** Born 22 Jun 1786 in Hackensack, NJ. Died young and was buried in Hackensack.

3. Rebecca Martin Born 8 Sep 1788. Married William Demarest in about 1807. They had six children. Becky died 15 Oct 1867 and was buried in Ohio.

As you enter the information for each person on this page of the book, you should record the source of the information. Let's go through the steps:

1. On the *Individual's Information* window, enter the information for James Michael Martin Sr.
2. When you have finished, but before you click **Save**, set up the *Source Clipboard* with the source information. Click the **Source Clipboard**  button.
3. First make an entry in the *Master Source List* about the book we are using. To do this, click **Click here to select or change the master source to cite** to bring up the *Master Source List* window.
4. Click **Add** to display the *Add a New Master Source* window.
5. Choose the source template to use and then click **Go to Step 2**
6. Enter the source information into the template fields.
7. **Save** the master source and **Select** it for use in the *Source Clipboard*.
8. In the *Detail Information* section, fill in the details fields.
9. Set the surety level to reflect your confidence in the accuracy of this information.
10. Click the **Analyze Source Quality** button to set the source quality.
11. Click **Save** to close the *Source Clipboard* and return to the *Information* screen.

Now you are ready to assign the source citation to the information you have entered for James Michael Martin Sr. You have three choices from the *Individual's Information* window:

1. You can place the cursor in the **Given** field and click the  button to assign the source to just that piece of information. Place the cursor in the **Birth** field and click  again. Continue doing this in each field on the window to assign the source from the clipboard.
2. Or, you can click  to have Legacy automatically assign the source to every field on the *Information* form that is not blank.
3. Or, you can click  and have the source assigned to the general *Unspecified* category for this person.

Option 1 is used when you return to add a newly found piece of information to an individual at a later time and want to assign a different source citation to that entry specifically.

Option 2 is generally the best and fastest method to use when entering information for an individual for the first time.

Option 3 is used if you are not interested in keeping specific source information for each type of event for an individual, but just want to record the source in one place.

Saving the *Source Clipboard*

If you find that you are reusing a particular source citation, you can save it to disk for use in the future. Up to ten different citations can be saved. To save a citation, click **Save** after loading the desired master source and filling in the detail fields. When the *Save Source Clipboard* window appears, select one of the ten save positions by clicking it. Next, enter a name (up to 40 characters) in the **Name** field to describe the setup and then click **Save**.

Loading a Saved *Source Clipboard*

If you have saved one or more *Source Clipboards*, you can quickly load one back in. Simply click **Load**. When the *Load Source Clipboard* window appears, highlight the entry you want to load and then click **Load**. (Or just double-click on the entry.) The citation is loaded from disk and is placed on the clipboard.

Quick-Loading a Saved *Source Clipboard*

You can also load any of your saved clipboards by right-clicking on the  button whenever it is visible. This pops up a small list of the saved clipboards where you can simply click the one you want to load.

Erasing Saved Clipboards

To erase an entry from the list, highlight it and then click **Delete**.

The Name List

What It Shows

The *Name List* displays a list of individuals. It can either contain all the individuals in the entire family file or just a search subset. The list has a minimum of six columns: one for the RIN number (or the User File#), one for the individual's full name, one for the individual's sex, and three tag columns. You can also show all nine tag columns as well as columns for Potential Problem alerts and Hints. The area to the right of the list contains information about the highlighted individual and his or her family. The information shown can be customized. (See *Displaying and Changing an Individual's Details* on page 96.) The *Name List* is displayed by clicking the **Name**

List  icon on the **My Toolbar** tab of the **Ribbon** bar.

The *Name List* can also include the alternate names as well as married names that have been recorded for various individuals. This makes the list especially useful when trying to find a specific person whose name may have been spelled differently on different records or when a nickname or married name has been used.

To include alternate names or married names (Deluxe Edition only), click on the **Options** button and select **Include Alternate Names** and/or **Include Married Names**.

Click # to sort the list in record number order.

Enter a RIN here to jump to that person in the list.

Click **Given** to sort the list in order of given name(s).

Click **Surname** to sort the list in surname order.

Click **Select** to bring up the Information screen for the highlighted person.

Click **First** to jump to the beginning of the list.

These nine columns show the tag settings for each individual.

Click **To-Do** to create a list of tasks needing to be done.

Click **Options** for a menu of things you can do from the *Name List*.

Click **Search** to find individuals and marriages using specific criteria.

These icons show that Legacy has found Hints that you might want to view.

These icons show that Legacy has found Potential Problems you might want to view.

These tabs display additional information for the highlighted person. Click a tab to change the information shown.

Sorting the List

The *Name List* can be displayed in either surname order, given name order, or RIN order. Click **Surname**, **Given** or **#** at the top of the window, or in the boxes next to them.

Finding an Individual

If the list is long, you can search for an individual in the list by RIN, given name, or surname. To search by surname, click in the **Surname** box and type the name you want to find. Enter the surname first, followed by a comma and then the given name(s). To search by given name, click in the **Given** box and type the given names, followed by a comma and then the surname if known. To search by RIN, click in the **#** field and type the number you want to locate. As you type, Legacy automatically jumps to the nearest matching name in the list.

Selecting an Individual

To select an individual from the list, highlight the name and click **Select**, or double-click the name in the list.

Editing an Individual

If you want to edit the information for any one person in the list, highlight the name and click the **Edit** tab. The individual's edit fields appear.



(Help index: **Edit: Tab on Name List**)

Adding, Deleting, or Editing an Individual's Events

If you want to add, delete, or edit an individual's events, highlight the name and click the **Events** tab.



(Help index: **Event: Tab on Name List**)

Displaying and Editing an Individual's Family

To display a list of an individual's family members, highlight the name and click the **Family** tab. The individual's parents, siblings, spouse, and children appear. You can edit a family member or marriage information by highlighting the family member and clicking the desired edit button below the list.



(Help index: **Family tab: on name list**)

Adding, Deleting, or Editing an Individual's Sources

If you want to add, delete, or edit an individual's sources of information, highlight the name and click the **Sources** tab.



(Help index: **Source: tab on name list**)

Adding, Deleting, or Editing an Individual's Notes

If you want to add, delete, or edit an individual's notes, highlight the name and click the **Notes** tab.



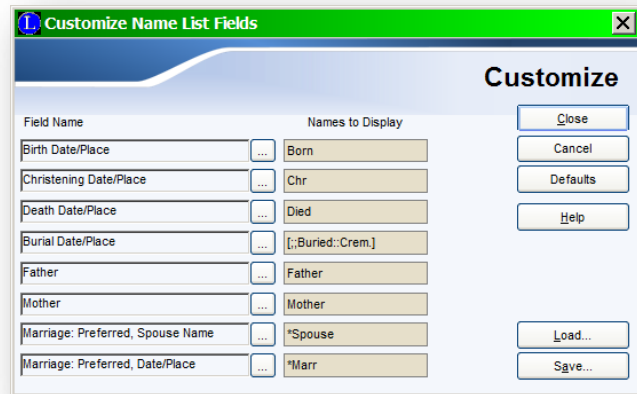
(Help index: **Notes: on name list**)

Displaying and Changing an Individual's Details

To display changeable details about an individual, highlight the name and click the **Detail** tab. There are up to eight lines on the *Detail* screen that can contain information.

Each of these information lines can be changed to other pieces of information you

might want to view instead. To change the lines, click any of the descriptive labels to the left of the lines (for example, “Born,” “Chr,” “Died,” or “Buried”). The *Customize Name List Fields* window then appears where you can select the new information you want to see.



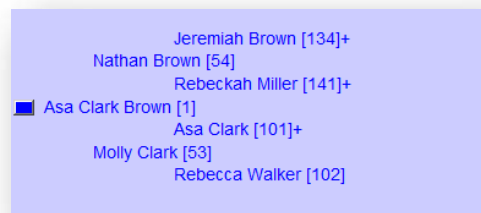
► To select the pieces of information to be shown on the Detail tab:

1. Click at the right of the item you want to change.
2. From the resulting *Field Names to Display* list, select the new item by highlighting it and clicking **Select**.
3. Continue with steps 1 and 2 until you have selected the information you want to display. If you want to display fewer than eight items, choose **blank – display nothing** from the *Field Names to Display* list.
4. When you are finished, click **Close**.

You can save up to ten arrangements of custom fields for future use. To save the current arrangement, click **Save**. To reload an arrangement that was previously saved, click **Load**. (You can also reload a saved arrangement by right-clicking on the field names back on the *Name List*. This pops up a small list of your saved arrangements where you can select the desired one.)

Navigating

Detail Tab At the bottom of the **Detail** tab is a three-generation pedigree chart. The starting person on the chart is the highlighted person in the *Name List*. Use the pedigree chart



to navigate along family lines. Click on anyone in the pedigree chart to navigate to that person in the *Name List*. The chart is then redrawn for the new person.

Family Tab The *Immediate Relatives* list shown on the **Family** tab can also be used for navigating through family lines. Double-click any name to navigate to that person in the *Name List*.

Immediate Relatives	
par-Nathan Brown [54] and Molly Clark [53]	
self-Brown, Asa Clark [1] (1792-1866)	
sib-Brown, Rebekah [52] (1794-1796)	
sib-Brown, Samuel Miller [51] (1795-)	
sib-Brown, Alanson [119] (1797-)	
sib-Brown, Frank [120] (1799-)	
sib-Brown, Ruth [121] (1801-)	
sib-Brown, Charles [122] (1803-)	
par-Private and Private	
sp-Reynolds, Elizabeth [33] (1794/1804-Bef 1832)	
ch-Brown, [21] (Abt 1815-)	
ch-Brown, Nathan R., Reverend [23] (Abt 1817-1897)	
ch-Brown, [20] (Abt 1819-)	
ch-Brown, Lorenzo D., Reverend [43] (1822-1918)	
sn-Huffman, Eleanor [34] (1803-1874)	

Creating a To-Do List

To create a *To-Do List* of tasks (like finding a birth certificate), that need to be done, click the **To-Do** icon



in the lower-left corner. (See *The To-Do List* on page 119 for more details.)



(Help index: **To-Do lists**)

Printing a Name List Report

Whenever you create a list of individuals or marriages, you can also print a report containing those names. For example, if you search for all the people in your family file who have lived in New Jersey, a list is displayed containing the names found. This list can be printed by clicking the **Options** button at the bottom of the *Name List* window and then choosing **Print...** from the menu. The *List Report Options* window appears, where you can select the information you want to include on your report.



For complete information about printing list reports from the *Name List*, see the Legacy Help system and search the index for: **List report options**

Other Options

Clicking **Options** displays a menu of options you can do from the *Name List*.

Include Alternate Names (*Deluxe Edition* only) includes the alternate name entries for each individual in your family file. When turned on, the alternate names, also known as AKAs, are shown in the list with a leading tilde (~) character.

Include Married Names (*Deluxe Edition* only) includes the married name entries for individuals in your family file. When turned on, the married names are shown in the list with a leading (\$) character.

Show User ID Number in List (*Deluxe Edition* only) toggles the RIN column in the *Name List* with User ID#. When the User ID#s are being displayed, typing in the # field at the top of the form searches for ID numbers.

Show Tags to include in the list lets you choose between showing any three tags or showing all nine tags.

Include Potential Problems in the list shows the potential problems icons.

Edit an Individual lets you make changes to the individual's information for any person highlighted in the list.



(Help index: ***Information screen***)

Delete Individual erases the highlighted individual in the list.

Advanced Deleting allows you to delete tagged individuals.



(Help index: ***Advanced deleting***)

Advanced Tagging lets you can tag an individual, their family, descendants, or ancestors. In addition, you can tag a focus group or everyone in the file. You can untag everyone in the file.



(Help index: ***Advanced tagging***)

Advanced Sourcing displays the *Advanced Source Citation* screen where you can assign the current Source Clipboard citation to multiple records in your family file.



(Help index: ***Advanced: source citations***)

Set Living allows you to set the **Living** status to **Yes** or **No** for multiple individuals at one time.



(Help index: ***Set living***)

Set Bookmark lets you set a bookmark on the highlighted name so you can quickly and easily return to it later.

Go to Bookmark returns to the bookmarked name at any time.

Customize Display lets you select the fields shown on the **Detail** tab.



(Help index: **Customize name list detail**)

Zoom zooms in and out, which changes the size of the lettering in the list. You can choose a font size or have Legacy size the font automatically.

Searching for Individuals

You can search for individuals in your family file in many different ways by clicking **Search**. The type of searches you can do include: Query by Example, Detailed Search, and Miscellaneous Searches. (See *Searching for Individuals* on page 257 for more details.)



(Help index: **Search**)

Find... Displays the Search window where you can search for whatever you desire.

Show Name List This option causes the *Name List* to display the contents of the last search list.

Show All Tagged You can choose to limit the Name List contents to just those individuals who are tagged on a certain tag number. Choose 1 through 9 (1 through 3 in the Standard Edition).

Show All Untagged You can also display only individuals who are untagged on a certain tag number. Again, choose 1 through 9 (1 through 3 in the Standard Edition).

Show Everyone with a Hashtag of... You can also display only individuals who have a specific hashtag assigned to them. The *Search Hashtags* screen is displayed where you can select the desired hashtag.

Search Internet for Current Person displays the *Search the Internet* screen. (See **Search the Internet** for more information.)

Jumping Into the List

If you are in name-order mode, jump to the first name beginning with any letter by clicking the letter buttons above the list. You can also jump to the beginning or end of the list by clicking **First** or **Last**.

Tagging Records

You can tag or untag records using any of the nine tag numbers for an individual by double-clicking the appropriate tag column to the right of each name in the list.

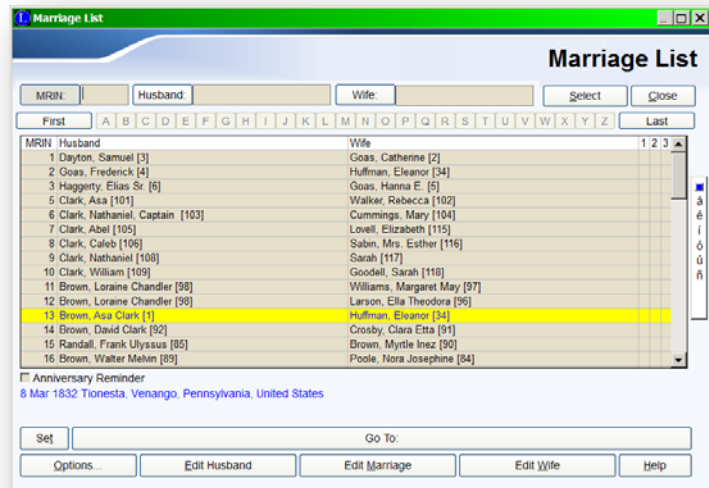
Legacy also offers some advanced options for tagging records. (See *Advanced Tagging* on page 124 for more information.)

Note: If a tab caption is preceded by an asterisk (*), it means that there is information to view on that tab. If all the fields on a tab are blank, there is no asterisk shown.

The Marriage List

The *Marriage List* shows husband-wife combinations. If a person was married three times, there are three entries in the list. The *Marriage List* is displayed by clicking the **Marr**

List  icon on the toolbar.



Editing a Marriage

To edit the marriage information for a couple, highlight the names and click **Edit Marriage**. The *Marriage Information* window appears.

To edit either the husband's or wife's information, click **Edit Husband** or **Edit Wife** respectively. The *Individual's Information* window appears.

Searching for a Husband or Wife

If the list is fairly long, you can search for either a husband's name or a wife's name by typing the name in either the **Husband** or **Wife** field, starting with the surname. As you type, the nearest matching name is displayed in the list. You can also search by marriage record ID number (MRIN) by typing the number into the **MRIN** box.

Jumping Into the List

You can jump down into the list to names beginning with a certain letter by clicking the letter buttons above the list. This feature is available while the list is sorted by

either the husband's or wife's name. If the list is sorted by MRIN, only the **First** and **Last** buttons are enabled.

Selecting a Marriage

To select a marriage, either highlight the line and click **Select** or just double-click the line.

Bookmarks

You can set a bookmark in the marriage list so that you can return quickly and easily to it later, by clicking **Set**. To return to the bookmark later, click **Go to**.

Options

The following options are available by clicking **Options**:

Sort by Given Name, Surname (*Deluxe Edition* only) changes the sort order of the **Husband** or **Wife** column and shows the given names before the surnames. When in this sort mode, this option changes to **Sort by Surname, Given Name** so that you can change back if desired.

Print displays the *Marriage Report Options* screen where you can print a *Marriage List* report.


Remove Marriage Link unlinks the husband and wife from each other and from any children.

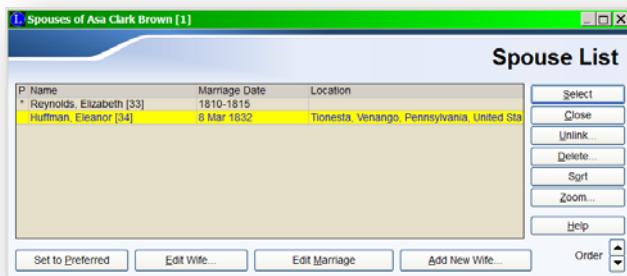
Untag All lets you remove the marriage tags for any of the displayed tag numbers in the list.

Zoom zooms in and out, which changes the font size for the *Marriage List*.

The Spouse List

The *Spouse List* shows all the spouses for the current individual along with the dates and locations of their marriages. The Spouse List is reached by clicking the Spouse List

icon  on the Husband or Wife toolbar.



Selecting a Spouse to Display

► **To change the currently displayed spouse:**


Highlight the desired spouse and click **Select**. You can also double-click on the desired spouse to select him or her.

Changing the Sequence of Marriages

► **To change the order of the entries in the *Spouse List*:**

1. Highlight the line you want to move.



2. Click Up or Down  in the lower-right corner of the window to move the line up or down in the list.

Sorting the List

► **To sort the *Spouse List* by the marriage dates:**

Click **Sort**. All marriages with no marriage date are sorted to the beginning and the remainder are displayed in date order.

Setting a Spouse to Preferred Status

A *preferred* spouse is the spouse that is automatically shown when that person's husband or wife is selected or displayed on the *Family View* or *Pedigree View* as you navigate through your ancestors and descendants. This avoids having to ask which spouse to display each time you change generations. The spouse that is currently set as *preferred* has an asterisk (*) in the **P** column of the *Spouse List*.

► **To move the *preferred* setting to a different spouse:**

Highlight the spouse you want to set as *preferred* and click **Set to Preferred** in the lower-left corner.

Adding a New Spouse

► **To add a new spouse to the *Spouse List*:**

1. Click **Add New Wife** (or **Add New Husband**) near the lower-right corner.
2. From the *Add* window, choose **Add a New Person**. The *Information* screen is displayed.
3. Fill in the new information and click **Save**.

Linking to an Existing Spouse

► **To link the current individual as a spouse to another person in the family file:**

1. Click **Add New Wife** (or **Add New Husband**) near the bottom-right of the screen.

2. From the *Add* window, click **Link to an Existing Person**. The *Name List* appears.
3. Select an existing individual.

Unlinking a Spouse

- ▶ **To remove the marriage link of the current individual from a spouse in the *Spouse List*:**
 1. Highlight the spouse you want to unlink.
 2. Click **Unlink** at the right side of the window. The *Unlink* window is displayed. This window shows the name of the current individual from whom the spouse will be unlinked, along with a list of any children who are currently linked to these two people. If you continue with the unlinking, the children will remain linked to the current individual but will be unlinked from the spouse.
 3. If you are sure you want to unlink this spouse, click **Yes**. Otherwise, click **Cancel** to abort the command.


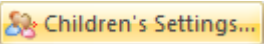
Note: Unlinking a spouse from a marriage does not delete the person from the family file. It just breaks the marriage tie. The unlinked person still shows up on the *Name List* and is available for linking to someone else.

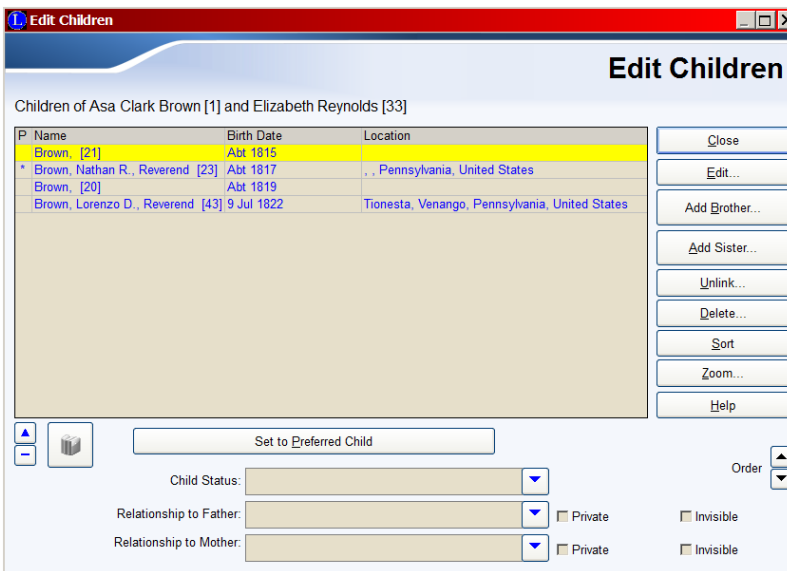
Deleting a Spouse

- ▶ **To delete a spouse from the *Spouse List*:**
 1. Highlight the name of the spouse you want to delete.
 2. Click **Delete** at the right of the window. The *Delete* window appears showing the names of those who will be affected by this deletion. These include the parents of the person being removed (who will lose a child), the current individual who is the husband or wife of the person being deleted, and the children of the marriage (who will be losing a mother or father).
 3. If you are sure you want to delete this person, click **Yes**. Otherwise, click **Cancel** to abort the deletion.

Note: When you delete an individual it totally removes that person from the family file and also removes any links between the individual and any other person in the file. Before completing this command, Legacy displays a window warning of the consequences and listing all the people from whom this individual will be unlinked. These include parents, spouses, and children. If you are sure that you want to continue, click **Yes**. If you want to abort the command, click **Cancel**.

The Child List

The *Child List* shows all the children linked to the current parents. To display the *Child List* click the  button in the upper-right corner of the children list. You can also reach it by either choosing **Children's Settings**  from the **View** tab of the **Ribbon** bar or right-click on any child's name in the list of children on the *Family* or *Pedigree Views* and then choose **Children's Settings**.



Children of Asa Clark Brown [1] and Elizabeth Reynolds [33]

P	Name	Birth Date	Location
	Brown, [21]	Abt 1815	
*	Brown, Nathan R., Reverend [23]	Abt 1817	, , Pennsylvania, United States
	Brown, [20]	Abt 1819	
	Brown, Lorenzo D., Reverend [43]	9 Jul 1822	Tionesta, Venango, Pennsylvania, United States

Buttons: Close, Edit..., Add Brother..., Add Sister..., Unlink..., Delete..., Sort, Zoom..., Help

Set to Preferred Child

Child Status:

Relationship to Father: Private Invisible

Relationship to Mother: Private Invisible

Order:

Changing the Sequence of Children

The initial sequence of the children in the *Child List* is set by the order in which they were entered. If you want to change this order, highlight the child whose name you



want to move, and then use the Up and Down  arrows in the lower-right corner to move the name within the list.

Setting a Child to Preferred Status

The *preferred* child is generally the child in your direct line and is indicated by an asterisk (*) in the **P** column of the list. Knowing who the *preferred* child is makes it much easier to move down your line from one descendant to the next. You can change the *preferred* child by highlighting the desired name and clicking **Set to Preferred Child** in the lower-left corner of the window. The asterisk in the left column of the list then moves to the new child's name.

Sorting the List

If you would like to sort the list in ascending order by the birth dates of the children, click **Sort**. Note, you can also globally sort all the child lists for all families in your family file.



(Help index: **Sort > Children > Sort Children, Marriages, and Events**)

Child Status

You can tag each child with a special status if you like. Choose from Twin, Triplet, Stillborn, etc. You can also add new statuses. The default setting when a child is first added to the list is blank. To set a new status, highlight the child and then type the new status or click the **Down** arrow on the **Child Status** field at the bottom and select the new status by clicking on it.

Relationship to Father and Mother

The link between a child and his/her father and mother can be specified and sourced. Choose from such things as Biological, Adopted, Guardian, Sealed, Step, as well as a place to record Challenged and Disproved relationships. The default setting is blank, meaning Natural. To set a new status, highlight the child and then type the new status or click the **Down** arrow on the **Relationship to Father** or **Relationship to Mother** fields at the bottom and select the new status by clicking on it. (These fields are displayed on both *Children List* window as well as the *Parents List* window.)

Private and Invisible Relationships

You can mark the **Relationship to Father** or the **Relationship to Mother** as **Private** or **Invisible** by putting a checkmark in the **Private** or **Invisible** option to the right of the appropriate relationship status. A **Private** setting cause the relation to not be mentioned on reports or web pages. An **Invisible** setting treats the relationship as non-existent on reports and web pages. It is as if the child and parent are not linked together. For example, you might have a **Biological** relationship between a child and a father that you don't want to publicize or even acknowledge.

Editing a Child's Information

You can edit the individual's information for any person in the list by highlighting the name and clicking **Edit**. The *Information* screen appears, where you can make changes.

Adding a Brother or Sister to the List

You can add an additional brother or sister to the *Child List* by clicking either **Add Brother** or **Add Sister**. The *Add* window appears, where you can choose to **Add a NEW Person** or **Link to an EXISTING Person**.

Unlinking a Child

► **To unlink a child from the list:**

Highlight the name and click **Unlink**.

When you choose to unlink an individual from his or her parents, you are telling Legacy to break the tie that exists between that person and his or her parents and siblings (if any). Unlinking a person does not delete the individual from the family file. It simply disconnects him or her from having a child relationship to the current parents and a brother-sister relationship with any siblings.

Before completing the Unlink command, Legacy displays a window containing the name of the parents and a list of any siblings currently linked to the individual. You can then complete the unlinking by clicking **Yes**, or abort the command by clicking **Cancel**.

Deleting a Child

► **To delete a child from the list:**

Highlight the name and click **Delete**.

Deleting an individual totally removes that person from the family file and also removes any links between the individual and any other person in the file. Before completing this command, Legacy displays a window warning of the consequences, and lists all the people from whom this individual will be unlinked. These include parents, spouses, and children. If you are sure that you want to continue, click **Yes**. If you want to abort the command, click **Cancel**.

Note: Deleting a person can have several effects. The person will no longer be listed as a child of their current parents. The person will no longer be listed as a parent to children. Any children currently linked will no longer be connected to their grandparents. Before deleting a person, make sure it is what you really want to do. Once a person is deleted, the only way to get that individual back is to re-enter a record from scratch.

The Parents List

This is a list of all the names who are currently linked to an individual as parents. A person might have more than one set of parents if an adoptive family line is being tracked, for example.

Setting Parents to Preferred Status

The *preferred* parents are shown in the list with an asterisk (*). These parents are shown on the *Family View* and *Pedigree View*.

► **To assign *preferred* status to other parents:**

1. Highlight the line by clicking on it.
2. Click **Select**. The window closes and the new preferred parents are displayed.

Adding New or Additional Parents

You can also add a new set of parents by clicking **Add New Parents**. This adds a new set of “Unknown” parents to the list. Click **Add Father** and **Add Mother** to fill in their information. (See *How to Add > Additional Parents* in Legacy Help.) If you want to attach a set of parents who are already in the family file, click **Link to Existing**. The *Marriage List* appears, where you can select the couple to add.

Unlinking a Set of Parents

► **To unlink a set of parents in the list:**

1. Highlight the line by clicking on it.
2. Click **Unlink From Child**. The *Unlink* box appears, showing the parents and siblings who will be unlinked by this action.
3. Click **OK** to confirm your intent.

Zooming the Parents List

If you would like to have the font size in the *Parents List* made larger or smaller, click **Zoom**. The *List Font Size* window appears, where you can select a different font size. When you return, the list redisplayes in the new size.

Master Location List

The *Master Location List* contains all the location names that are being used in the current Family File. Legacy only records one copy of each different location and points any use of it to its entry in the list. This saves a lot of disk storage space by eliminating duplications.

To the right of the list of locations is the **People using this location** box. The box shows which individual in your family file are using the currently highlighted location.

Below the list of locations is a map of the current location. To see the map you must have Internet access and be online.

Selecting a Location from the List

To select a particular location, click on it and click the **Select** button. You can also select a location by double clicking.

Adding New Locations

When you enter a location in a Place field, Legacy checks to see if the name is already in the *Master Location List*. If it is not found, it is added to the list. Depending on the setting in *Options*, you may or may not be prompted for confirmation. When the *Master Location List* is displayed, you can add new locations by clicking the **Add** button below the list. This pops up a form where you can type in the name of the new location, a short name, notes and latitude and longitude coordinates, which is then added to the list.



(Help index: ***Adding or Editing Master Locations***)

Editing Locations

You can change the spelling of any location in the *Master Location List* by selecting it and clicking the **Edit** button. Remember, however, that a change to a location in the master list affects all references to it.

Tagging Locations

You can tag locations so that you can filter the *Location Report* to a certain subset. To tag a location, click the checkbox in the **Tag** column to the right of the desired location name.



(Help index: ***Location Report***)

Verifying Locations (Deluxe Edition only)

From time to time you need to do some cleanup on your *Master Location List*. This includes combining locations that are really the same, getting rid of locations that are no longer used, things like that. Sometimes you will run across various locations that appear to be in conflict with each other. For example, **New Barbadoes, Essex, New Jersey** and **New Barbadoes, Bergen, New Jersey**. Which one is right? Well, after doing a little research you find that they are both correct. New Barbadoes was in Essex County from 1693 to 1710 and was then transferred to Bergen County (and even later became the city of Hackensack). You want to keep them both but somehow you need a way to mark

them as such. This is where the **Verified** tag comes in. Simply click on the checkbox column to mark them as verified, thus indicating to you later that they are "keepers." (You can also put a comment in the **Notes** fields, describing this.)

Notes

If you have added a note to a location (by using the **Edit** feature), an **X** shows in the **N** column in the list.

Other Options

Clicking the **Options** button displays a shortcut menu where you can choose from the following options:

Deleting a Location

If a location in the master list is not being used, you can remove it from the list by highlighting it and then choosing the **Delete** option. Legacy confirms that the location is not being used and removes it from the list. If one or more records are referencing the location, it cannot be removed. In this case, Legacy offers to display a list of all records currently using the name.

Tag and Untag

You can tag **All Records** in your location list or just the **Highlighted Records**. (You can highlight more than one location in the list by holding down the Ctrl key while you click the locations.)

Combining Duplicate Locations

When correcting misspelled place names, you may find that you end up with duplicates within the *Master Location List*. To remove these duplicates and clean up the list, choose the **Combine** option. Legacy then goes through the list, combines the duplicates and moves the links.

Purging Unused Locations

To remove unused locations from the *Master Location List*, choose the **Purge** option. Legacy checks each name to see if it is being used. If not, it is removed from the list.

Importing a Locations List

You can import a list of locations from a different Family File by choosing the **Import** option. Legacy prompts for the name of the other Family File and then loads its list. (If you end up having duplicate master locations that only differ by format, you should combine them together. See **Combining Multiple Locations** below in this topic.)

Printing the List or the Map

You can print the contents of the list in two different formats by clicking **Print...** Choosing **Location List** from the submenu prints a simple report listing the locations in the current sort order. Choosing **Location Report** opens the *Location Report* options screen where you can print a report showing who uses each location and where they use them. Choosing **Bing Maps...** prints the map for the current location. (See **Mapping My Places** on page 113 for more information.)

Page Setup

You can change page orientation, margins, paper size, and font size before printing a report.

Zoom

You can change the font size of the master list grid.

Options for Non-Locations

If you have entries in your list that are not actual places but are valuable information that you would like to keep, you can move these entries into the Notes fields of the individuals and marriages that use them.



(Help index: ***Moving Non-Locations Out of the Location List***)

Jump with Edit Sorting

When you edit a location name, it is immediately re-sorted into its new position in the *Master Location List*. Sometimes this moves the edited location far away from the current position. You can choose to have the current position move to the new point in the list or to just stay where you were and move to the next location name. If there is a checkmark next to the **Jump with Edit Sorting** option, the current position will move to the next location name after the newly sorted position of the edit name. If there is no checkmark next to the option in the shortcut menu, the current position will just move down to the next location. Clicking the option toggles the checkmark on and off.

Bookmarks

If you are working your way down the *Master Location List* cleaning it up by combining variations of the same location name, correcting comma locations, etc., you can drop a bookmark to save your place until you return to resume the process. Click **Set Bookmark** to drop a bookmark. Click **Go To Bookmark** to return to the previously set bookmark.

Contract/Expand Location Parts

Legacy can automatically expand and contract state, province, and country names within your master locations.



(Help index: **Contract/Expand Location Parts**)

Who is Using This Location

The list to the right of the locations shows a list of all the individuals who are using the current location. As you highlight each name in the list, you can see which events use the current location. These are shown below the list, under the Edit button.

Editing a Person in the List

To edit a person in the list, click the **Edit** button to display their *Information* screen.

Options

Click the **List Options** button for the following commands:

Create Search List

You can create a new search list of names (replacing whatever is in the current search list) or add the names to the current search list.

Print the List

You can print a report list showing the names that use the current location.

Tag or Untag All the Records in the List

If you have just the records in the list tagged on a certain number, you can quickly jump to each of them by clicking the right or left tag arrow on the *Family/Pedigree View*. You can then edit each record and remove or change the list reference.

To tag the records in the list:

1. Click the **List Options** button, hover over the **Tag Everyone in List** option and then choose the tag level you want to use from the flyover menu. If you would like to make sure all the other records in the Family File are untagged first, hover over the **UnTag Everyone in File** option and choose the desired tag level.
2. To tag all the entries in the list, click **Tag Everyone in List**.
3. Click **Close**.

Now, when you return to the *Family/Pedigree View*, you can rotate through all the tagged records and make the needed changes.



(Help index: **Tagging Records**)

Adding a Picture to a Location



Click the **Picture** icon to add pictures, sounds, video clips, and documents to the location.

Deleting a Location

You cannot easily remove a location from the master list if it is being used by one or more individuals or marriages. If you are sure you want to delete a location, you will have to remove the references to it shown in the list of individual who are using the location.

Sorting the List

You can display the *Locations List* in different sorted orders for the purpose of finding duplicate entries by clicking the **Sort** button.



(Help index: **Sort Location List**)

Combining Multiple Locations

Often, through entering information and by importing records from other people you will end up with two or more variations of the same location, spelled a little bit differently. For example, you might end up with:


Pompton Pl., Morris, NJ
Pompton Plains, Morris, NJ
Pompton Plains, Morris Co., NJ
Pompton Plains, Morris, New Jersey
Pompton Plains, Morris, New Jersey, USA

All of these locations are obviously the same place and should be combined into just one, "good", location name. This is very easy to do in Legacy. To combine multiple locations:

1. Choose one of the locations that you want to keep. If it isn't exactly like you want it formatted, use the **Edit** button to fix it. This is now your "good" location name.
2. Highlight all the other locations in the group. If the group is contiguous, you can highlight the top location and then hold down the **shift** key while you click on the bottom location. The entire group will then be highlighted. If the various locations are not in a continuous block, highlight the first one and then press and hold down the **Ctrl** key while to click on each of the other locations in the group. Each one will remain highlighted as you click the others.
3. Click the **Combine** button at the bottom of the list. The caption on the button will now change to read **Combine With**.
4. Highlight the "good" location line by clicking on it.
5. Click the **Combine With** button at the bottom. All the "bad" locations are then combined with the "good" one and all the records in your family file that were pointing to the "bad" ones now point to the "good" one... (saving you potentially hours of editing).

Distance and Bearing Calculator

If you have the *Deluxe Edition* of Legacy you have access to the *Distance and Bearing Calculator*. Using this calculator you can figure the distance between any two cities in your family file that have latitude and longitude coordinates. To do this, you can highlight the two cities (click on the first city to highlight it and then find the second city and hold down the **Ctrl** key while you click on it. This will leave both cities highlighted)

and then click the  button and choose **Distance and Bearing Calculator**. You can also figure the direction to travel to get from one to the other.



(Help index: ***Distance and Bearing Calculator***)

The *Master Locations List* is reached by clicking the **down arrow** next to any location field. It can also be displayed by choosing **Master Lists > Locations** from the **View** tab of the **Ribbon** bar.

Mapping My Places

When all the locations where a family lived and worked are plotted on a map together, you can easily see the overall area in which the family spent their lives. You can visualize how the family members migrated from place to place as they grew older. (Or you can see if they stayed in one place their entire lives.) New research opportunities come to light as you see the surrounding cities, counties, provinces, and countries.

With Legacy Mapping you can see an overall view of a family's territory spanning the entire earth if necessary. You can also zoom right into the street level of anywhere in any country in the world.

There are two places in Legacy where mapping is available, the *Master Location List* and the *Map of Places* for an individual.

Note: An active Internet connection is required in order to use the mapping feature in Legacy. If you are not online, the maps will not be displayed.

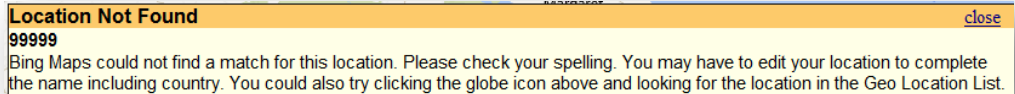
Master Location Mapping

Whenever the *Master Location List* screen is displayed, the current location in the list is shown on a map in the lower half of the window. (Unless you have the **Show Map** option unchecked or you are not connected to the Internet.) As you highlight locations in the list, the map is redrawn to display that place. If the location has an **L** in the **L** column (which stands for Latitude/Longitude) the map is drawn for the coordinates in the latitude and longitude fields for that location. If there is no **L**, Legacy submits the place name to *Bing Maps*TM over the Internet where it is matched with a location in its worldwide database. The resulting latitude and longitude coordinates are then recorded in Legacy for future use. Sometimes an acceptable close match in *Bing Maps* cannot be found for a place name. In this case, a small window is displayed with two or more location names to choose from. For example, Dixville, Morrison, Minnesota results in the following possibilities:



If you find one that is acceptable, click on it. If none of the choices are correct, click the close button in the upper-right corner.

If no possibilities are found by *Bing Maps*, which is rare, a message is shown telling you that you will have to use other tools to figure out the real location name.



Since *Bing Maps* only looks for current locations, a historically accurate place name that no longer exists may trigger a Place Not Found message.

Bing Maps is even smart enough to find US and Australian Postal Codes locations. If you only know a person's Zip Code, enter it into a master location. The map will display the location. Once this is done, you can change the zip code location to the actual city name found.

Sometimes *Bing Maps* returns some really ridiculous possibilities as it tries to find a place name match. Look them over carefully before accepting one. Note, You can always find the position on the map for yourself and then right-click to set the pin.

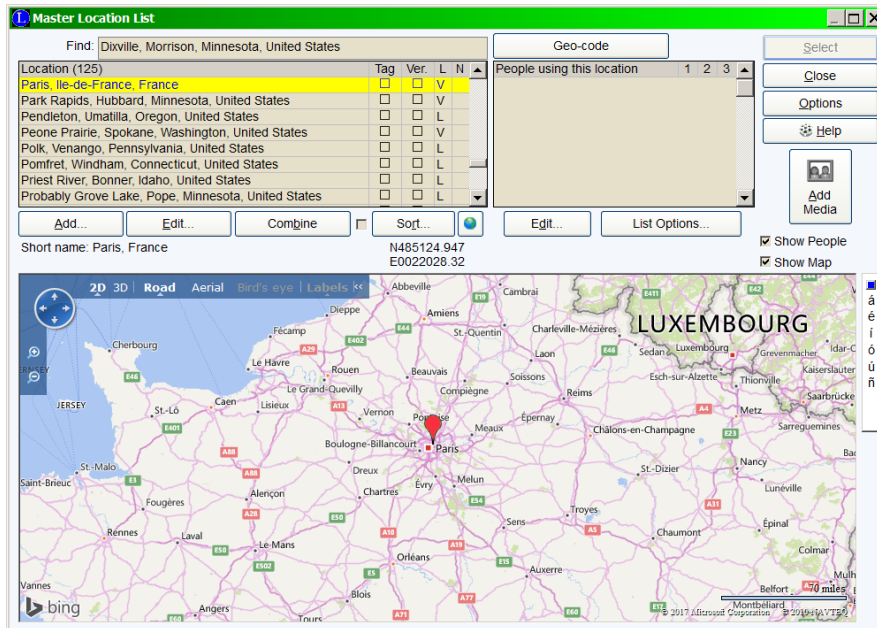
Geo-coding Your Locations


Geo-coding is a process that runs through all your locations and tries to find a match in the *Bing Maps* location database. Upon finding a match, the latitude and longitude coordinates are then recorded in Legacy. As you highlight any location in your *Master Location List*, this geo-coding is automatically attempted. You can have Legacy run through all of your locations automatically geo-coding what it can by clicking the **Geo-Code** button and then choosing **Geo-code all unresolved locations through Bing Maps**. As each location is resolved, an **V** is shown in the **L** column. At the end of the process, any location without an **V** will have to be looked at so see if you can figure out where they refer to.

If you would like to redo the geo-coding for a specific location, highlight the place name, click the **Geo-Code** button and then choose **Geo-code current location again through Bing Maps**. If mapping comes up with an obvious location error, you can also click the **Geo-Code** button and choose **Do not auto geocode this location**. Then use another location closer to the proper place to get the map close and then re-highlight the place you are mapping and right-click on the map to set the pin in the proper place.

Working with the Maps



Here is a typical map, in this case showing Paris, France:




Notice the  pushpin on the map at the location. The map only shows the current location. If you hover the mouse over the pin, the location name is displayed in a popup.







In the upper-left corner of the map is the *View Control*. The *View Control* lets you zoom in  and out , pan the map up and

down and sideways , switch from **Road** (drawn map) to **Aerial** (satellite view) to **Hybrid** (a combination of **Road** and **Aerial**) and **Bird's eye** (an angled airplane

view).

You can hide the *View Control* by clicking the  button at the upper-right corner. To display the *View Control* again, click .

If you double-click anywhere on the map, the point where you clicked will move to the center of the map and the map will zoom in one setting. You can also drag the map in any direction with the mouse.

The 2D view is a rendered (drawn) view.

Printing a Map

If you would like to print the map, click the **Options** button near the upper-right corner of the window and choose **Print > Bing Maps...** from the submenu. If you would like to print the map in landscape mode, click **Preferences** from the **Print** dialog box and change the **Orientation** to **Landscape** and then click **OK**. Click **Print** to send the map to your printer.


How to Make a Graphic File from the Map

If you would like to save the map as a graphic file that can be attached to a person, event, location, source, etc., you can use any good screen capture program, or you can use the Windows Snipping Tool (Google Windows Snipping Tool for instructions on how to use this tool that is built into Windows.)

Event / Repository Addresses

The *Event Address* and *Repository Address* screens provide researchers a place to record addresses where key events took place (for example a church) or where important records are located (for example an archive or library). The *Event Address* and *Repository Address* screens look and behave like the *Mailing Address* screen, except that they do not build a name and do not have *Mailing List* options.

► **To open an event address:**

1. Click the  button to the right of a birth, christening, death, or burial event on a person's *Information* screen and then choose the **Address** option from the popup menu. The *Event Address* window appears. It can also be reached by clicking the **Address**



icon in the *Add or Edit Event* window for an individual. In addition, the screen can be opened by selecting **Master Lists**


- > **Address Lists** from the **View** tab of the **Ribbon** bar, then choosing **Event**.
2. Select an address from the *Master Event Address List*.

► **To open a repository address:**

1. Select **View > Master Lists > Address Lists > Repository**. The *Master Repository List* appears.
2. Select an address.

You can enter a name, address, and up to two phone numbers for each event or repository address. You can also include e-mail and Internet addresses, plus latitude and longitude, notes, and pictures.

► **To add a repository address:**

1. Click **Add** on the *Master Repository List* window.
2. Fill in the address, phone number(s), e-mail address, and Internet address.
3. Click the  button at the right of e-mail and Internet addresses to send a message or connect to the Internet without leaving Legacy.
4. You can include the latitude, longitude, and notes about the address.
5. When you are finished, click **Save**.

Other Address Options

Save saves the address.

Cancel closes the window without saving any entries or changes.

Address List opens the *Master Mailing, Event, or Repository Address* lists.

Delete removes an address from an individual or event.

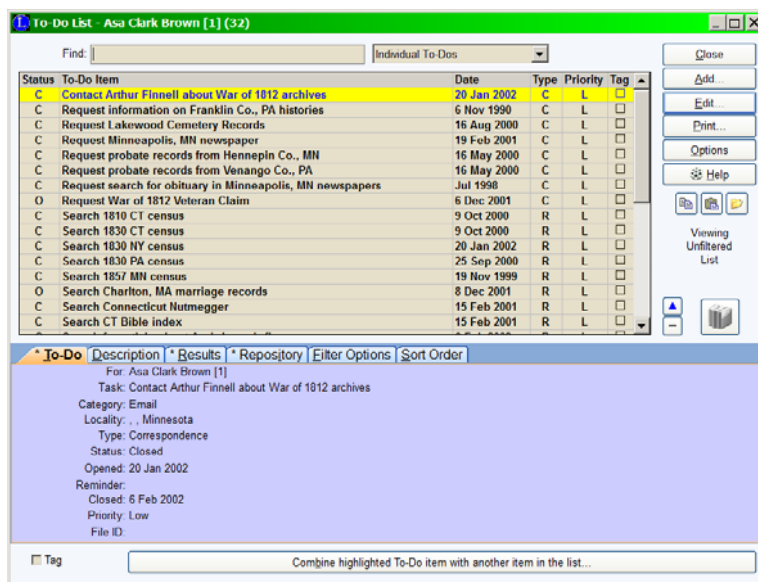
Repeat repeats the entry made in the same field of the last address you entered during the current session. If the current field already contains an entry that would be overwritten by the **Repeat** option, Legacy asks for permission before replacing it. You can also use **F8** to repeat a field. Clicking on the line labels also repeats the entries. Clicking the **Address** label repeats both address lines. Clicking on any other box label repeats just that line (including the “Name” label). You can repeat an entire address by right-clicking **Repeat**.

Help opens Legacy Help.


Picture opens the *Media Gallery*, where pictures can be added.

The To-Do List

The *To-Do List* makes it easy to track research and other tasks that need to be done. Legacy allows you to create *General* and *Individual To-Do Lists*. For example, you can create a *General To-Do List* of books and microfilm to search when visiting a library; or create an *Individual To-Do List* for your great grandfather by listing your need to find his obituary, his World War I service record, and his birth certificate. *To-Do Lists* can be printed out for research trips or used as research logs to be placed with your transcriptions, photocopies, and correspondence.



Find Type the first few letters of a To-Do Item name to jump to it in the list.

To-Do Type By default, **General To-Do Lists** display when opening the *To-Do List* from the toolbar or from the **View** tab of the **Ribbon** bar. By default, **Individual To-Do Lists** display when opening the *To-Do List* from an *Individual's Information* screen, the **Husband** or **Wife** box in the *Family View*, or when the primary individual is selected in *Pedigree View*. To select the type of To-Do item you want to view, click the **Down**  arrow (to the left of the **Close** button) and choose from the list.

The To-Do Item List

Status indicates whether the task has been completed or not (**O** = Open, **C** = Closed).

To-Do Item is the name of the task.

Date is the opening date of the task.

Type is the type of task (**R** = Research, **C** = Correspondence, **O** = Other).

Priority indicates the importance of the item: High, Medium, or Low.

Tag indicates whether the To-Do items has been tagged for printing.

Tabs

Tabs that display an asterisk (*) contain information.

To-Do shows who or what the highlighted item is for, as well as the task name, task type, status, open date, closed date, priority, and filing reference number.

Task Description is the detailed description of the task to be done.

Results shows the outcome of the task.

Repository is the location or repository to visit or contact to accomplish a task.

Filter Options lets you choose the criteria (category, locality, status, type, priority, and tagged) used to display To-Do items on the list. When your selection is complete, click **Apply Filter**. To see every To-Do item on the list, click **Show All**.

Sort Order lets you sort items on the *To-Do List*. For example, the primary consideration might be status (open), the second, priority, and the third, open date. This order ensures that all items marked Open go to the top of the list, sorted by priority, then date. After selecting the three sort levels, click **Apply** for your choices to take effect.

Buttons

Close exits the window.

Add adds a new To-Do item.

Edit allows you to edit a highlight item on the list.


Print prints a *To-Do List*.

Options gives you a choice to **Delete, Combine Duplicates, Import, Tag, Untag,** and **Zoom**.

Combine Highlighted To-Do Item to Another To-Do Item in the List

allows you to select a To-Do item on the list that you want to combine with another item. Click this button and the button face changes to **Highlight Destination To-Do Item. Then Click This Button**.

Sources of Information

To attach a source to the to-do item, click the **Sources**  icon. (See *Citing Your Sources* on page 71 for more information.)

Source Clipboard

The *Source Clipboard* is a feature in Legacy that can tremendously increase the efficiency with which you document the sources of the information you enter into your family file. (See *Source Clipboard* on page 88 for information on how and why to use this feature.)




(Help index: **Source clipboard**)




To-Do Clipboard (*Deluxe Edition only*)

You can copy To-Do items to the clipboard and then paste them again where desired.


► To copy a To-Do item to the clipboard:

1. Highlight the item you want to copy.
2. Click the  button.

► To paste an item from the clipboard to a list:

1. Open the To-Do list you want to add the item to.
2. Click the  button.

► To Save the current clipboard to disk:

1. Click the  button.
2. Highlight one of the ten entries where you want to save the clipboard.
3. Enter the name for the saved clipboard in the Name field.
4. Click **Save**.

► To load a clipboard item previously saved:

1. Click the  button.


Tag Checkbox

The *To-Do List* contains a **Tag** column. You can tag a To-Do item by clicking its checkbox, or by highlighting the item and selecting the checkbox in the lower-left corner of the window.

Creating a New To-Do Item


► To create a To-Do item:


1. To create a general To-Do

item, click the **To-Do**  icon on the toolbar or select **To-Do List** from the **View** tab of the **Ribbon** bar.

Or

To create an individual To-Do

item, click the **To-Do**  icon associated with the individual in *Family View* or *Pedigree View*, or open the *Information*

screen and click the **To-Do**  icon.

2. In the *To-Do List* window, click **Add** to create a new To-Do item.
3. In the *To-Do Item* window, select a category for the task in the **Category** field.
4. Enter the locality of the task in the **Locality** field.
5. Enter a task name in the **Task Needing to be Done** field.
6. Note that the **Open Date** defaults to the current date and the **Status** defaults to Open when adding a new item.
7. If you want to be reminded of this To-Do item on the Legacy Home tab, enter a reminder date. The reminder will start showing on the Home tab when the advanced reminder time arrives.
8. If the task involves visiting or writing to a specific place, click **Add** on the **Repository** tab to enter it on the *Master Repository List*. Type the name, address, phone number(s), plus e-mail and Internet addresses. If the location is already on the list, click **Select** and choose it from the *Master Repository List*.
9. Indicate the Type of task to be done by selecting **Research**, **Correspondence**, or **Other**.
10. Indicate the Priority of the task by selecting **High**, **Medium**, or **Low**.
11. Click the **Task Description** tab to enter a brief explanation of the task.

12. Click the **Results** tab to enter a summary of the results.
13. Click **Save** when finished.

Editing an Item

► To edit a To-Do item:

1. From the *To-Do List* screen, highlight the To-Do item to be edited.
2. Click **Edit** to modify the selected item.
3. Edit the To-Do item.
4. Click **Save** when done.

Tagging Records

You can tag individuals and marriages to mark them for various reasons. For example, you might want to tag some people to be included in a report, or tag some individuals whom you are currently researching so you can find them quickly when you get more information. There are nine tag numbers you can use for each individual and for each marriage. (If you are using the *Standard Edition*, only three are available.) This allows you to use different tag numbers for different purposes. Perhaps you want to export all #3 tagged individuals, print an ancestry report for all #2 tagged people, and use #1 tags for names you are currently working on.

Tag	Counts
Tag 1	0
Tag 2	0
Tag 3	0
Tag 4	0
Tag 5	0
Tag 6	0
Tag 7	0
Tag 8	0
Tag 9	0

To tag an individual, click the desired tag number in either the *Husband* or *Wife* box. To tag a marriage, click the desired tag on the *Marriage* bar.

When an individual or marriage is tagged, the tag box is filled with a color other than white . When it is untagged, it is filled with white. (You can set the tag colors in the *Customize* section.)

Advanced Tagging

The *Advanced Tagging* window is used to quickly tag or untag families and other larger groups of related people. Entire ancestral or descendency lines can be tagged (or untagged) with the click of a button. This window is activated by right-clicking one of the three **tag** boxes. The *Advanced Tagging* window appears.


The person whose name appears in the box at the top is considered the current individual. All tagging actions (listed below) are done with this individual in mind. If you want to change to a different person, close the window, navigate to the new person, and then right-click on the **Tag** box again.

The Tag number (1 through 9) boxes under the name show the current status of each of the nine tags (three in the *Standard Edition*). You can tag or untag any of these by clicking on them.

Tagging or Untagging

Select either **Tag** or **Untag** to specify the type of action you want to accomplish. All further actions will follow this command.

Tag Number

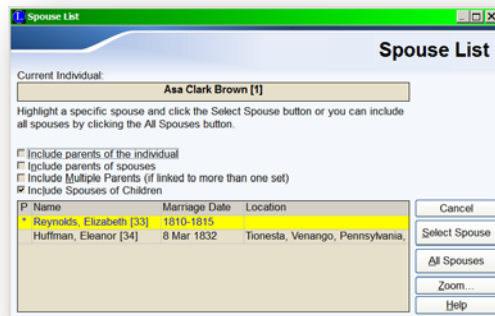
Use the Up and Down  arrows to the right of **Make changes on #** to select the tag number to work with. All further actions will affect this number.

Tagging an Individual

To tag (or untag) a specific individual, select (or clear) the desired **Tag** boxes under the name box. You generally don't come in here just to tag an individual. It is much easier just to click their **Tag** box on the *Family View* or *Pedigree View*, but the option is included here just in case.

Tagging a Family

A family is considered to be the selected individual and his or her spouse(s) and all the children from the individual and his or her spouse(s). To tag (or untag) a family, click **Family**. The *Spouse List* for the current individual appears.



If the individual has more than one spouse, you can select one of them or all of them by clicking the appropriate button on the right side.

You can also use the four checkboxes above the spouse list to expand the scope of the family. You can include:

- The parents of the current individual.
- The parents of the selected spouses.
- Multiple parents, if any.
- The spouses of the children.

Tagging a Person's Ancestors

You can tag (or untag) all the direct-line ancestors of the selected individual for a specific number of generations and even include the descendants of those ancestors if you want to include an entire branch of a family.

To tag (or untag) ancestors, click **Ancestors**. The *Ancestor Options* window appears.



(Help index: **Tag:Ancestors**)

Tagging Everyone in the Entire Family File

You can tag (or untag) every person in the entire family file by clicking **Everyone**.

Tagging a Person's Descendants

A person's descendants include the individual's children from every marriage, their children from all of their marriages, and so on.

To tag (or untag) descendants, click **Descendants**. The *Descendants Options* window appears.



(Help index: **Tag:Descendants**)

Tagging Everyone in the Current Search List

You can tag everyone in the current search list by clicking **Everyone in Search List**. (If there is no current search list, this button is disabled.)

Tagging Everyone in the Entire Family Line

You can tag (or untag) everyone connected to the current person by clicking **Entire Family Line**. This means all of the individual's ancestors and descendants. It also

includes all the descendants of the ancestors, ancestors of the descendants, and all their spouses. Everybody linked in any way to the starting individual is included. This is a great way to separate one tree from another in a family file.

Clear All Tags on All Numbers, For Everyone

You can clear all tags on all tag numbers for everyone in the entire family file, by clicking **Clear All Tag Numbers For Everybody**. **Warning:** If you have set any tag numbers as permanent tags to indicate things like having finished researching this person for the moment, you probably don't want to use this option to clear ALL the tags. Just clear as many tags as needed for the new project.

Naming the Tags

You can enter a description in the **Tag Descriptions** fields for each of the nine tag numbers to remind you what they are being used for. These descriptions are optional and for your own information.

Selecting the Tag Numbers for the *Family View* and *Pedigree View*

In the Deluxe Edition, the *Family View*, *Pedigree View*, and optionally the *Name List* show all nine tags. Optionally, in the *Name List*, you can choose to display only three tags. You can choose which three to show on the *Name List* on the *Advanced Tagging* screen. (Note, only three are available in the *Standard Edition*).

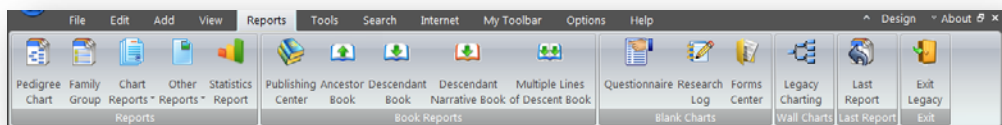
Creating and Printing Reports

What Goes In Should Come Out

There are several different report formats available within Legacy. They are accessed by choosing the **Reports** tab on the **Ribbon** bar.

Select a Report

Choose the **Reports** tab on the **Ribbon** bar.



This tab contains many different kinds of reports. These are grouped into four different types: **Reports**, **Book Reports**, **Blank Charts**, and **Wall Charts**.

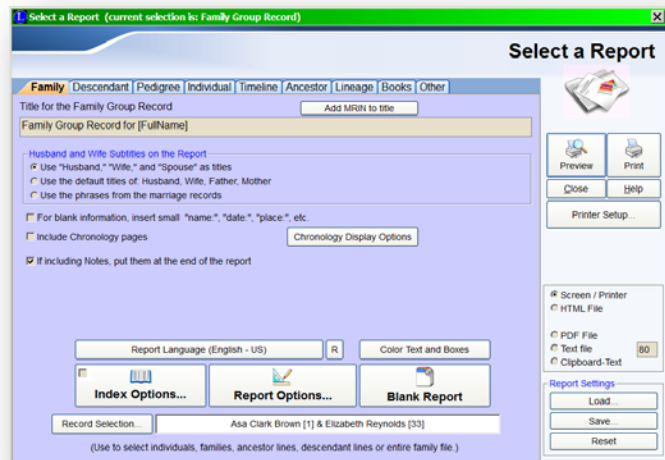
Illustration of the *Family Group Records* report is shown as an example for all of the screens.

This Family Group Report screen is representative of what you will see on the other report tabs on this window.

Report Language

For many of the reports in Legacy, you can choose from different languages when generating them. For example, you might want to produce a Family

Group Record in German to send to a cousin there. To select a language, click the **Report Language** button and choose the language file to be used when generating the report. There are many language files available. These can be found on the



www.LegacyFamilyTree.com web site. To reset the language selection back to the default value, click the **Reset** button.

Color Text and Boxes

When printing reports that included boxed information, you can select from four different coloring styles (or none at all).

None

Prints black text in boxes with a white background.

Color all text and boxes the same

You can choose the text color and the background color of the boxes. You can also choose to **Only color individuals tagged on a certain tag number** and/or **Only color individuals with a certain hashtag**.

Male / Female Colors

You can select the text and background colors to be used for males and females.

Ancestor Colors

Choose to use group 1 or group 2 ancestor colors for the boxes.

Options

All the reports from the Reports and Book Reports section of the Reports Tab of the Ribbon Bar except those under Other Reports and the Statistics Report have a **Report Options** button. There are also **Index Options** from which you can choose index style, number of columns, and border lines. A Location index is also available. (See *Index Options* on page 130 for a complete description of all the available index options.)

Selecting or clearing the appropriate checkboxes and option buttons establishes what will appear in the report. If an option is not available for a particular report, the check box or option button will be disabled.

Report Options

Click **Report Options** to open the *Report Options* window where there are five tabs. Each tab contains several options that you can use to customize the printout. Each tab and its options are described below. (Note: Some options are greyed out/disabled either because they are mandatory or because they don't apply to the particular report.) For a complete explanation of what each option means see:



(Help index: **Report Options**)

Include Tab

Lets you specify what you want to include in the report. These include individual pieces of information, events, addresses, and notes.

Format Tab

These options control the overall look of the report including boxes, lines, highlighting, compression of information (so that more will fit on a page), name formatting, section page renumbering, removal of blank lines, formatting of event paragraphs, and inclusion of address information.

Notes/Stories Tab

The options on this tab let you choose the type of notes you want to include on the report. In addition to notes, you can select which stories to include.

Sources Tab

Choose to include source citations, how they should be formatted and where to print them. You can also include pictures.

Pictures Tab

This is where you indicate that you want to include pictures in a report, which pictures to include, what size, if you want drop shadows, etc.

Other Options

Privacy Options

Clicking the **Privacy Options** button on the right edge of the *Report Options* window displays the *Privacy Options* screen. From here you can suppress the details for living individuals, and details for deceased spouses or children of living individuals. You can also override the default privacy settings so that people who are marked as private or invisible are included in the report.

Page Setup, Headers, Footer Options

Clicking the **Page Setup, Headers, Footers** button displays the *Page Setup* screen.

Page Setup Tab

Set the page margins, orientation, and size. You can also choose double-sided printing if your printer supports it. Border lines can also be selected.

Headers and Page Numbering Tab

Choose the header position and page numbering options.

Footers Tab

Set options for compiler and report credit information.

Report Fonts

Choose the fonts to use on the report and what size and attributes to use. You can also set the line spacing.

Index Options

Name Index

Birth & Death Years on Names includes birth and death years in parentheses after names.

Include Alternate Names to include each individual's alternate names in the report index, select this option. The alternate names are shown with a leading tilde character (~).

Include married names to include the married names of the individuals in the name index. (Married names are entered on the *Marriage Information* screen, either manually or automatically, depending on the married name rule setting. Note: The married name entered via the married name rule setting can be overridden and the name you enter will be used in the index.)

Style 1 shows each surname only once in the index, with associated given names arranged under it.

Style 2 shows each individual by surname and given name in the index.

Uppercase SURNAMES formats surnames in uppercase.

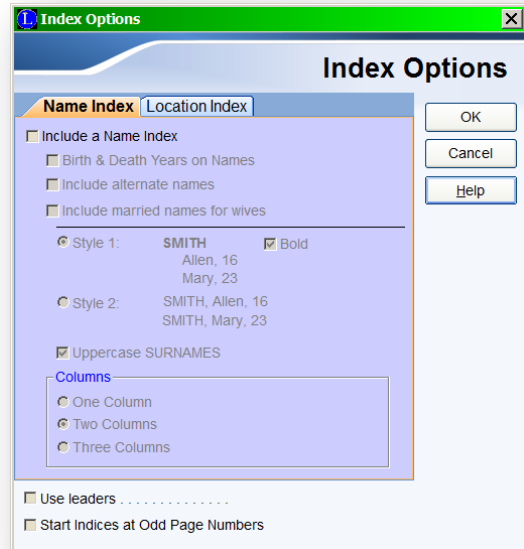
Columns chooses one, two, or three index columns per page.

Location Index

Include a Location Index adds a Location Index after the regular index.

Include Latitude and Longitude includes these values in the index entries.

Include Notes includes the location notes (if any) along with the index entries.



Display each location in reverse order causes the locations to be printed from the largest jurisdiction to the smallest. **Seattle, King, Washington** would be printed as **Washington, King, Seattle**.

Columns Choose one, two or three index columns per page.

Use Leaders adds leaders (.) between the name and its page number(s).

Start Indices at Odd Page Number starts an index on an odd page number.

Printing the Report

There are several different ways that you can produce reports. (Due to the formatting requirements of various reports, some of the output formats may not be available):

- Preview
- Print
- Create a Text file
- Clipboard as Text
- Create an HTML file
- Create a Rich Text file
- Create a PDF file

Preview

Click **Preview** to generate and display the report on the screen. This step should be taken to proof the report prior to printing, as it can keep you from wasting paper and help you save time.

Note: When you are viewing a report in the *Preview* window, you can then produce a matching PDF file by clicking the **Create PDF** button.

The screenshot shows a software window titled "Print Preview" for a "Family Group Record". The main content area displays a "Family Group Record for Asa Clark Brown". It includes sections for "Husband: Asa Clark Brown", "Wife: Eleanor Huffman", and "Children". Each section lists names, birth dates, and locations. There are two small portrait photographs of men. The right side of the window contains a control panel with buttons for "Close", "Jump", "Help", "Print", "All Pages", "Range...", "This Page", "Zoom: In", "Out", "Screen Width", "Whole Page", "Create PDF", and "Clipboard...". The zoom level is set to 25%.

Print

Click **Print** to send the report directly to your default printer. This should only be done when you are confident that the report format is just as you want it.

Create a Text file

Use this output option to create your report as a text file (with no special formatting) When you choose this output format, the **Preview** button is disabled and the **Print** button is changed to **Create**. Clicking **Create** prompts you for an output file name and location.

Create Report on the Windows Clipboard as a Text file

This option creates a text version of the report (with no special formatting) and then places it on the Windows clipboard. You can then paste the report anywhere text can be placed. This is a great way to quickly include a report in an email.

Create an HTML file

Creates your report as an HTML file – the same format used on web pages. When you choose this output format, the **Preview** button is disabled and the **Print** button is changed to **Create**. Clicking **Create** prompts you for an output file name and location.

Create a Rich Text file

Your report is created as a rich text file along with all the formatting included in a printed report. This type of report file can be loaded into a word processor where you can add or edit it as desired. When you choose this output format, the **Preview** button is disabled and the **Print** button is changed to **Create**. Clicking **Create** prompts you for an output file name and location.

Create a PDF file

Use this option to output your report as a PDF (Portable Document Format) file. This popular type of file retains all the formatting of a printed report and is easy to attach to emails. When you choose this output format, the **Preview** button is disabled and the **Print** button is changed to **Create**. Clicking **Create** prompts you for an output file name and location.




For complete information about previewing reports, see the Legacy Help system and search the index for: **Print Preview**

Ancestor Book

An Ancestor book (also known as an *Ahnentafel* report) is a book-style report beginning with a specific person and moving back through the person's ancestors for a given number of generations. (*Ahnentafel* means *ancestor table* in German.) This type of report describes each person in a narrative format and gives each person a unique ahnentafel number. The starting individual is given a number of 1. From then on, an individual's father is assigned a number that is two times the number of the individual. The mother is assigned a number that is twice the individual's plus 1. If you are number 1, your father is 2, your mother is 3, your father's father and mother are 4 and 5, and your mother's father and mother are 6 and 7, and so on. If a person is missing, their number is skipped.

► To create an Ahnentafel (or Ancestor) book:

1. From the **Reports** tab on the **Ribbon** bar choose .
2. Set the desired options.
3. Click **Preview** or **Print**.

The *Ahnentafel (Ancestor) Book/Report Options* window has five tabs and three buttons that you can use to customize the printout. Each tab and button is described below:

Options Tab

Insert Underlines inserts an underlined space so that missing given names, surnames, and dates and places can be filled in later.


Total Generations sets the number of generations to include in the report. A three-generation report would include an individual, his parents, and his grandparents.

Table of Contents generates a table of contents, listing the starting page for each generation included in the report. You can specify the format of the table.

Ancestors of John Fitzgerald KENNEDY

First Generation

1. John Fitzgerald KENNEDY (52) (1) was born 29 May 1917 in Brookline, Norfolk Co, MA (1, 2). He was christened 19 Jun 1917 in Brookline, Norfolk Co, MA. John died 22 Nov 1963 in Dallas, Dallas Co, TX (1, 2). He was buried 23 Nov 1963 in Arlington, Arlington Co, VA (1).



President Kennedy

While traveling around the country, President Kennedy urged people to serve their country.

Notes: In 1960 he became President of the United States.

He wrote 2 books, including "Profiles in Courage", which won him a Pulitzer Prize.

He had personal finances that were estimated to be around \$10 million while in the Presidency.

He was assassinated in Dallas, TX.

Medical: He suffered from many physical ailments, including a weak spine, Addison's disease, being underweight, severe allergies, periodic asthma, and a weak stomach. He also suffered scurvy fever, measles, appendicitis, tonsillitis, frequent colds.

Later on in life he faced serious back surgery two times, one of the operations almost claimed his life.

Noted events in his life were:

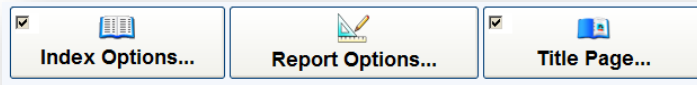
1. Occupation: (1) Senator
2. Education: 23 Sep 1940, Palo Alto, Santa Clara Co, CA. (1) Stanford University
3. Religion: (1) Roman Catholic

John married Jacqueline BOUVIER (53) (MSRN 133, daughter of John Vernois BOUVIER III (46) and Janet Norton LEE (46), on 12 Sep 1953 in Newport, Newport County, RI, USA.

Children from this marriage were:

1. Caroline Bouvier KENNEDY (54) (1973)
2. John Fitzgerald KENNEDY Jr. (55) (1960)

Other Report Options



Click **Index Options**, **Report Options**, and **Title Page** at the bottom of the **Options** tab to open up additional screens where you can select many more customization features. Click **Help** on these screens to read all about the options available.

Page Layout Tab

Start New Page After Each Generation starts each generation on a new page.

Print Names in Bold puts each name in bold-face type.

Paragraph Indents set the distance to indent each type of paragraph included in the report.

Custom Report Spacing choose blank space to be included above the report sections.

Heading Layout Tab

Title for Page 1 prints the title only at the top of the first page of the report.



(See Help for field codes that can be used in Titles and Headings. Help index: **Report, Title options**)

Headings prints the title at the top of all the pages after the first page.

Subtitles specifies the type of generation subtitles printed. These can include the generation number (Generation One, Generation Two), or the relationship of the generation (Parents, Grandparents), or both (Generation Two, Parents). You can also specify the position of the subtitles as being left-justified or centered.

Wording Tabs

You can specify phrases when creating narrative paragraphs of the report.



(Help index: **Ancestor book reports**)

Options

You can include and exclude many items in this report, including a timeline chart and an ages column to further illustrate the life events of the individual. These options are all selected on the *Chronology Display Options* screen (page 22).

Descendant Book

A Descendant Book is a book-style report that begins with a specific person and moves forward through the person's descendants for a given number of generations. Descendant Books are available in both Register and Modified Register (NGSQ) formats. The Modified Register (NGSQ) format describes each person in a narrative format and gives each person a number. The starting individual is given a number of 1. From then on, each person encountered is assigned the next higher number. Children with an upcoming main entry are displayed with a "+" to the left of the child number. The Register format is similar to the Modified Register (NGSQ) except that only individuals who have children are assigned a number.

► To create a Descendant book:

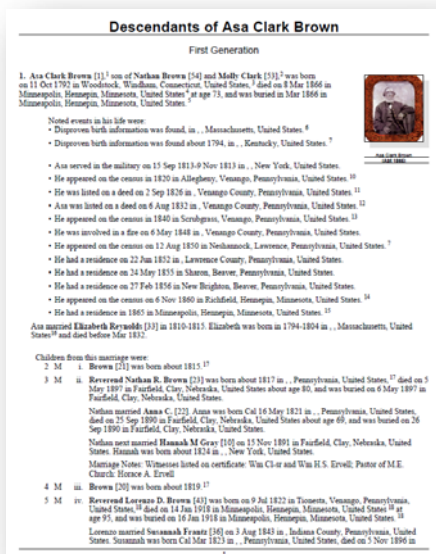
1. From the **Reports** tab of the **Ribbon** bar, choose
2. Click **Descendant Book** under the **Book Report** column.
3. Choose either **Register** or **Modified Register (NGSQ)** format.
4. Set any other desired options.
5. Click **Preview** or **Print**.



(Help index: **Descendant book report**)

Report Options

There are five tabs and three buttons that you can use to customize the printout. Each tab and button is described below:



Options Tab

Insert Underlines inserts an underlined space so that missing given or surnames, or date or places can be filled in later. You can also have spaces reserved for death information even though the person is marked as living.

Total Generations Sets the number of generations to include in the report. A three-generation report would include an individual, his parents, and his grandparents.

Table of Contents generates a table of contents listing the starting page for each generation included in the report. You can specify the format of the table, including the option to include leader lines (.....) between the chapter names and the page numbers.

Include Main Entries For includes individuals with children but no spouses (standard format), individuals with children *or* spouse(s), or all individuals. You can also choose to show the family line back (in parentheses) to the starting ancestor after the name of main individuals using either generation numbers or person numbers after their names.

Other Report Options



Click **Index Options**, **Report Options**, and **Title Page** at the bottom of the **Options** tab to open up additional screens where you can select many more customization features. Click **Help** on these screens to read all about the options available.

Page Layout Tab

Start New Page After Each Generation starts each generation on a new page.

Print Names in Bold puts each name in bold-face type.

Paragraph Indents sets the distance to indent each type of paragraph included in the report.

Custom Report Spacing choose blank space to be included above the report sections.

Heading Layout Tab

Title for Page 1 prints the title only at the top of the first page of the report.

Headings prints the title at the top of all the pages after the first page.



(See Help for field codes that can be used in Titles and Headings. Help index: **Report, Title options**)

Subtitles specifies the type of generation subtitles printed. These can include the generation number (Generation One, Generation Two) or the relationship of the generation (Parents, Grandparents), or both (Generation Two, Parents). You can also specify the position of the subtitles as being left-justified or centered.

Wording Tabs

You can specify phrases when creating narrative paragraphs of the report.


Print the Book

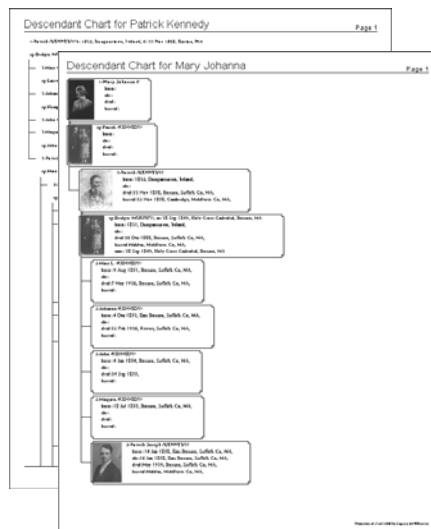
The book can be printed in different ways. See page 131 for the various options.

Descendant Chart

The *Descendant* chart includes much of the same information for each individual as the **Ancestor** chart but the design of the page is different. In this report, the individual is placed at the top of the page and each successive generation is indented to the right. All members of each family are listed.

► To create a Descendant chart:

1. From the *Family View* or *Pedigree View*, highlight the person you wish to begin with.
2. Click the **Reports**  icon to display the *Select a Report* screen.
3. Click on the **Descendant** tab.
4. Set the desired options.
5. Click **Preview** to view the report on the screen before printing, or click **Print** to send the report directly to the printer.



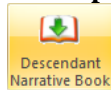
(Help index: **Descendant chart**)

Descendant Narrative Book

A Descendant Narrative Book is a book-style report that begins with a specific person and moves down through the person's descendants for a given number of generations. The descendants of each new child are exhausted before the next child is introduced. This type of report describes each person in a narrative format and may or may not give each person a number.

► **To create a Descendant Narrative book:**

1. From the **Reports** tab on the **Ribbon** bar



click

2. Set the desired options.
3. Click **Preview** or **Print**.



(Help index: **Descendant narrative report**)

The *Descendant Narrative Book Options* window has five tabs and three buttons that you can use to customize the printout.

Options Tab

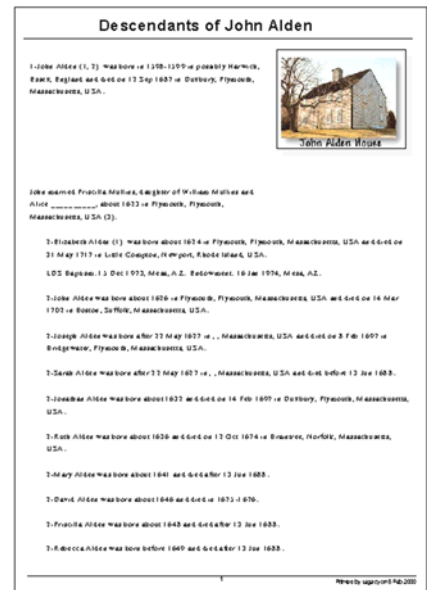
Insert Underlines inserts an underlined space so that missing given or surnames can be filled in later.

Total Generations sets the number of generations to include in the report. A three-generation report would include an individual, his parents, and his grandparents.

Table of Contents generates a table of contents listing the starting page for each generation included in the report. You can specify the format of the table, including the option to include leader lines (.....) between the chapter names and the page numbers.

Numbering System You can choose between three numbering systems for the report: Generation numbers, Henry numbers, or de Villiers numbers – or you can to not number the entries.

Gender for Children Shows the gender of each child.



2. Choose **Other Reports** from the **Reports** tab of the **Ribbon** bar and then choose **Family Picture Tree** from the dropdown list.
3. Set all the desired options from the various tabs on the screen.
4. Click either **Print** or **Preview** to view the report.



(Help index: **Family Tree Picture Report**)

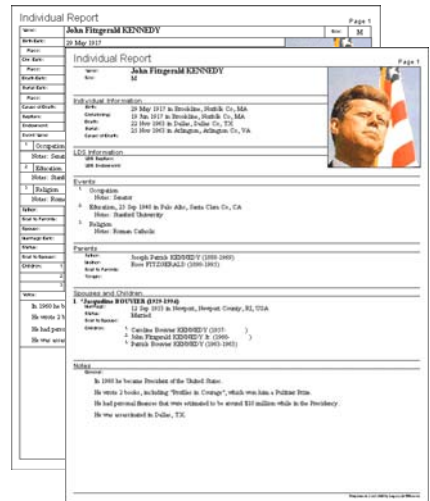
Individual Report

The *Individual* tab is used to build a report on all items related to the personal information of the person. These items include names, dates, event information, parents, children, notes, pictures, etc. Select the items you want to include in the report.

There are many options that can be set on the *Individual Report*, including two different styles (Regular and Summary). You can also print a blank *Individual Report* form by clicking the **Blank Report** button.

► **To create an Individual Report:**

1. Highlight the person you want to start with on either the *Family View* or *Pedigree View*.
2. Choose **Chart Reports** from the **Reports** tab of the **Ribbon** bar and then choose **Individual Chart** from the dropdown list.
3. Set all the desired options on the screen.
4. Click the **Index Options** and **Report Options** button to set additional options.
5. Click either **Print** or **Preview** to view the report.



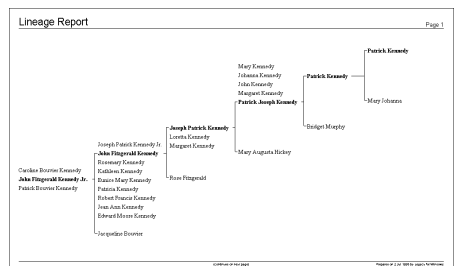
(Help index: **Individual: Reports**)

Lineage Report

The *Lineage* Report is a very simple report showing the father-to-father ancestry line from the selected individual along with the siblings.

► **To create a Lineage report:**

1. Highlight the person you want to start with on either the *Family View* or



Pedigree View.

2. Choose **Chart Reports** from the **Reports** tab of the **Ribbon** bar and then choose **Lineage Chart** from the dropdown list.
3. Set the desired options on the screen.
4. Click the **Index Options** and **Report Options** buttons to set additional options.
5. Click **Preview** to view the report on the screen before printing, or click **Print** to send the report directly to the printer.



(Help index: ***Lineage reports***)

Migration Report

It is interesting to see where the descendants of a particular ancestor spread out to over time. These include new towns, new counties, new states or provinces, and new countries. People move, striking out for new opportunities or to avoid unpleasant situations. Give Legacy a starting person and it will gather all the descendants, see where they were born and produce a nice report on the results.

The Migration report is reached by choosing **Other Reports > Migration Report** from the **Reports** tab on the **Ribbon** bar.

► **To print a Migration Report:**

1. Highlight the person you want to start with on either the *Family View* or *Pedigree View*.
2. Choose **Other Reports** from the **Reports** tab of the **Ribbon** bar and then choose **Migration Report** from the dropdown list.
3. On the **Options** tab, set the number of generation to look back and other desired options.
4. On the **Format** tab, set the formats and colors you want.
5. On the **Privacy** tab, select any overrides you would like to use.
6. Click **Preview** to view the report on the screen before printing, or click **Print** to send the report directly to the printer.



(Help index: ***Migration report***)

Multiple Lines of Descent Book

A Multiple Lines of Descent Book Report is a book-style report that begins with various specified people and moves forward through their descendants for a given number of generations. This type of report describes each person in a narrative format and gives each person a number. It is in the same format as the Descendant Book report. (See Descendant Book on page 136.) The starting individual is given a number of 1. From then on, each person encountered is assigned the next higher number. The multiple lines usually intersect at some point. These intersections are indicated in the report.

► **To create a Multiple Lines of Descent Book Report:**

1. Choose **Multiple Lines of Descent Book** from the **Reports** tab of the **Ribbon** bar. The *Select Multiple Lines of Descent* window is displayed.
2. Select two or more couples to include in the report by entering their MRIN numbers. (You can use the *Marriage List* to help select the couples.)
3. Set all the desired options on the various tabs.
4. Click the **Index Options** and **Report Options** buttons to set additional options.
5. Click either **Print** or **Preview** to view the report.



(Help index: ***Multiple Lines of Descent Book***)

Origins Report (Deluxe Edition)

It's nice to know where we came from - where our ancestors were born. Most of us are a mixture of nationalities who have joined together and split apart for centuries. Legacy can gather all the ancestral birth places in your family file and let you know what percentage of each nationality makes up your heritage.

► **To create an Origins Report:**

1. Highlight the person you want to start with on either the Family View or Pedigree View.
2. Choose **Other Reports** from the **Reports** tab of the **Ribbon** bar and then choose **Origins Report** from the dropdown list.
3. Set the options you want to use on the **Options**, **Format**, and **Privacy** tabs.
4. Click either **Print** or **Preview** to view the report.



(Help index: ***Origins report***)

Chronology Comparison Report (Deluxe Edition)

It is often very difficult to know if two people in your family file are really the same person. Legacy includes a great tool to help you make this determination. The *Chronology Comparison Report* combines the names, surrounding family, and events of two people and displays them side-by-side in date order making it much easier to see if they are really the same person and should be merged together. When matching events are lined up next to each other with the same date, the backgrounds are colored either green, yellow, or red. Green means the events are the same. Yellow means that they are close or that there is no matching event on both sides. Red means that the events are incompatible.

The *Chronology Comparison* screen can be reached from several places in Legacy:

From the *Chronology View*: Click the **Options** button in the lower-right corner and choose **Compare Two People**.

From the **Reports** tab of the ribbon bar, choose **Other Reports > Chronology Comparison Report**.

From the *Merge Information Report* screen, select the **Chronology Comparison Report** option before clicking the **Print** or **Preview** button. (**Tools > Merge > Find Duplicates** or **Manual Merge**. Once you reach a screen suggesting two people may be duplicates, click **Options** then click **Print** and then choose **Chronology Comparison Report** before clicking **Print** or **Preview** on that screen.)

Who Do You Want to Compare?

When you first come into the *Chronology Comparison* screen you must select the two people to be compared. If you entered this screen from the *Chronology View*, the left person will already be selected from the current person on that screen. If entering from the *Merge* screen, both the left and right persons will be selected. Entering from the *Other Reports* option will require you to select both individuals.

To select a person, click the **Select Left Person** or **Select Right Person** button. This displays the *Name List* where you can choose the desired person. On the report, the name of each selected person is shown in blue (for male individuals) or red (for female individuals). If you see one blue name and one red name you may have made a mistake (either in who you selected or in how the genders were set). The background color for mismatched gender names will show as red and the genders will be appended to the names.

Options

Name Format - Given name(s), Surname or Surname, Given name(s).

Include RINS - Show the RIN numbers after the names.

Column Widths - Each side of the report contains four columns, date, event name, place, and person name (if applicable). You can adjust the percentage of the room each column takes by using the up and down arrows next to the percentage numbers for each column. The values automatically adjust themselves to equal 100% when all are added together.

Tip: The report is set to print in landscape mode by default. This gives the columns more room. If you want to allow for even more room, use the Page Setup option to increase the paper size to the widest that your printer allows, even if you don't have that size paper. This lets you see the most in print preview mode. (If you plan on printing the report you will have to set the paper width back to the size you actually have in your printer. Longer fields will automatically wrap to subsequent lines.)

Print Color Legend - Includes a legend at the bottom of the first page explaining what each cell background color means.

Display Options

You can select and deselect the surrounding family and information that is included on the comparison report. See [Chronology Display Options](#) for more information concerning these options.

Family Tree Bingo (Deluxe Edition)

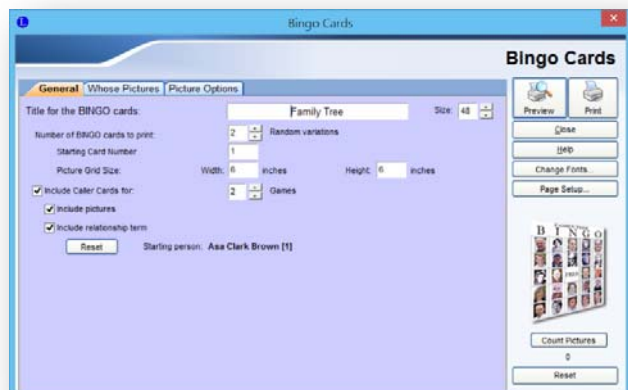
All work and no play is a bit boring... Legacy now includes a fun game that can be played by groups small and large. It is a great activity at a family reunion get-together or on a family game night.

To reach the *Family Tree Bingo Setup* screen, choose **Family Tree BINGO** from the **Other Reports** button on the **Reports** tab on the Ribbon bar.

Family Tree Bingo is very similar to the classic bingo game you grew up knowing except that in this variation Legacy gathers pictures from your family file and you are trying to match the pictures and names to end up with a complete row horizontally, vertically, or diagonally. There are several options that you can choose to customize your game cards:

► To create a Family Tree Bingo game:

1. From the **Reports** tab of the Ribbon bar, click on the **Other Reports** button and then select **Family Tree BINGO** from the dropdown menu. This displays the *Bingo Cards* window:



2. On the **General** tab, the default setting for the game include producing two bingo cards and two caller cards which lets two people play two games. You can change these settings to handle any number of people (the number of cards) and any number of games to be played (the number of caller cards).
3. Bingo card normally include pictures of the people on the cards along with their names and relationship to the starting person in your family file. These option too can be changed. (The starting person for relationships can be changed from within the report. The **Reset** button opens the *Set Relationships* screen. Note that if you set relationships to a different person here, they are still set to that person when you close the report. You'll need to go to **Tools > Set Relationships** to set them back to your normal starting person.)
4. On the **Whose Pictures** tab, you can choose which individuals and pictures you want to include on the cards. You might want to select all your direct-line ancestors or all the descendants of a past ancestor, or create a custom Focus Group of people to include. It's up to you.
5. The **Picture Options** tab lets you choose which pictures to include from the group you selected and what to do when a person doesn't have a picture. You can also choose where to print the names (under each picture or on a separate page) and whether or not to include the lifespan years.
6. When you have selected all the options you want to use, you can generate the bingo and caller cards by clicking the **Preview** or **Print** buttons.

Family Dictionary (Deluxe Edition)

The Family Dictionary is a list-type report of names sorted by surname, given name. In the case of females, the sorting is done by their maiden names. Included by default are birth and death dates and places and spouses. If birth or death data is missing, christening or burial data is used instead (if available) – this data is placed in curly brackets. The report can also include parents of the main people, marriage information, and children's information.

To generate the Family Dictionary Report:

1. Choose **Other Reports** from the **Report** tab of the **Ribbon** bar and then choose **Family Dictionary** from the dropdown list.
2. Select the desired reports options (described below).
3. Click either **Print** or **Preview** to view the report.

Options

Who to Print - Choose either to include only males, only females, or both males and females sorted by their surnames and given names.

Fields to Include

Names of parents - includes the names of the parents, in parentheses, of the main individuals.

Marriage date and place

List of children - includes the name of each child, and the date and place of their birth and death.

RIN numbers - adds the record identification number for each individual in the report after their names.

LDS Ordinance information - includes the date and temple of any ordinances that have been recorded.

Other Options

Include only individuals who are married - limits the list to only people who are linked to a spouse or partner.

Bold the names - prints the names of the individuals in a bold style so they are easily seen.

Blank line between individuals - Adds a blank line between individuals so that the break between people is easier to see.

Remove leading commas on locations - If any location have leading commas, they will be removed.

Report Language

You can choose from different languages when generating the Family Dictionary report. To select a language, click the **Report Language** button and choose the language file to be used when generating the report. There are many language files available. To reset the language selection back to the default value, click the **Reset** button.

Note: All the program-produced titles and subtitles and labels and all the dates will be translated but items such as user-enter titles and location won't be translated.

Selecting the Records to Print

You can print the Family Dictionary report for the males or female in your entire family file, or you can filter the report down with the following options by clicking the **Record Selection** button at the bottom of the screen. The options are:

All Families in the Entire Family File This option includes every male or female in the entire Family File.

Everyone in the current Search List This includes only the males or females on the current Search List.

Focus Group Records Includes males or females from your family file contained in the current focus group. (See [Focus Groups](#) for detailed information on how to set up a focus group.)

All Individuals with a certain Tag Level You select the tag level and then Legacy prints a group sheet for all families that have either the husband or the wife (or both) tag on that level.

All Individuals with Certain Hashtags If you have assigned hashtags to groups of people in your family file, you can select one or more of them to filter the report to include just those who have those hashtags. See [Hashtags](#) for more information on how to use this feature.

Pedigree Chart

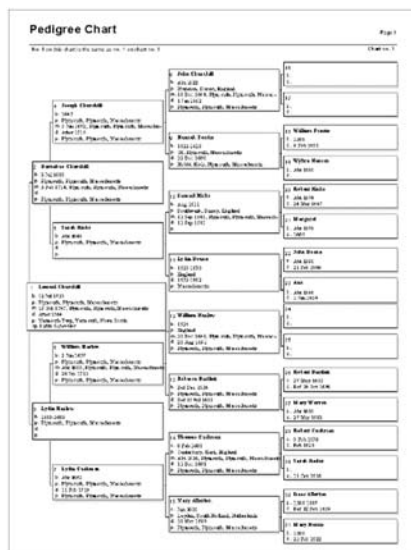
A *Pedigree Chart* includes an individual and his or her direct ancestors (parents, grandparents, great grandparents, etc.).

► To create a Pedigree Chart:

1. Choose **Pedigree Chart** on the **Reports** tab of the **Ribbon** bar.
2. Set the desired options on the screen.
3. Click the **Index Options** and **Report Options** buttons to set additional options.
4. Click either **Print** or **Preview** to view the report.



(Help index: **Pedigree charts**)



You can also print blank *Pedigree Charts* by clicking **Blank Report**.

Source Labels

You can print source labels to place on your source document folders. The labels can include the actual source citation along with optional source text and comments. This can be accessed from the **Reports Menu** > **Other Reports** tab where particular master sources can be printed onto labels. It can also be accessed from the **Assigned Sources** screen for a particular source citation.

► To print source labels:

1. Choose **Other Reports** from the **Report** tab on the **Ribbon** bar and then choose **Source Labels** from the dropdown list.
2. Choose which sources to print.
3. Select what you want to print on the labels.
4. Choose borders and pictures.
5. Select the label type, or choose the specifications for a custom-size label.
6. Make other adjustments as needed for margins, indentations, and line spacing.
7. Click the **Print** or **Preview** button to print or preview the report.



(Help index: **Source Labels**)

Statistics Report (Deluxe Edition)

Your family file contains lots of information. Legacy can gather it all together and show you many interesting statistics about your family. These include things like the number of living and dead people, how many of your relatives were born in each century, who lived the longest, their average lifespan per century, longest and earliest marriages, age at marriage, length of marriages, numbers of children, most popular given and surnames by century, most popular locations and much more.

► To print the Statistics Report:

1. Choose **Statistics** from the **Report** tab on the **Ribbon** bar. After Legacy quickly looks through your family file, the *Family File Statistics* screen appears.

You can now scroll through the list of statistics. Many of the statistic groups can be displayed in a graph by highlighting a line within the group and then clicking the **Show Graph** button.



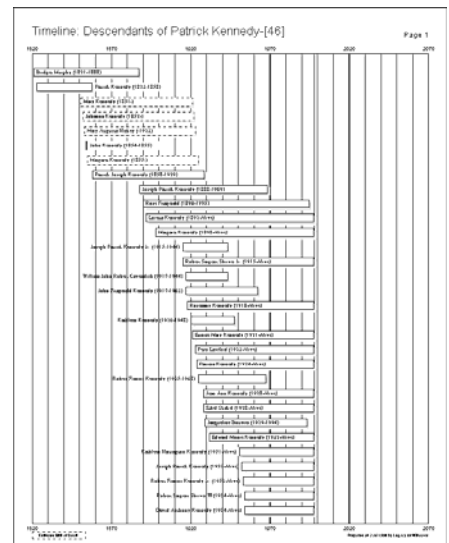
(Help index: **Statistics report**)

Timeline Report

The *Timeline* Report is designed to show an overview of dates and people in the family file.

► To create a Timeline report:

1. Highlight the person you want to start with on either the *Family View* or *Pedigree View*.
2. Choose **Chart Reports** from the **Reports** tab of the **Ribbon** bar and then choose **Timeline Chart**.
3. Set the desired options on the screen.
4. Click the **Index Options** or **Report Options** buttons to set additional options.
5. Click **Preview** to view the report on the screen before printing, or click **Print** to send the report directly to the printer.





(Help index: ***Timeline reports***)

Note: Dotted lines forming the boxes on the *Timeline* report are placed around the name when there is an *estimated* birth or death. Legacy estimates the birth or death if one or the other date is missing in the individual's data. The default number of years is 70. The number of years printed across the page and the average life span can be changed. If the individual's name is longer than the life box (as determined by the birth date and death date), the name is placed to the right or left of the box.

Lots of Other Reports...

There are many other reports available in Legacy. Most of these are reached from the **Reports** tab on the **Ribbon** bar. For complete information of each of the reports listed below, simply choose the **Help Index** on the **Help** tab of the **Ribbon** bar and then type in the keywords within the parentheses below. (If the keywords have a colon separating them, it means that the keyword after the colon is a sub-keyword of the first word.)



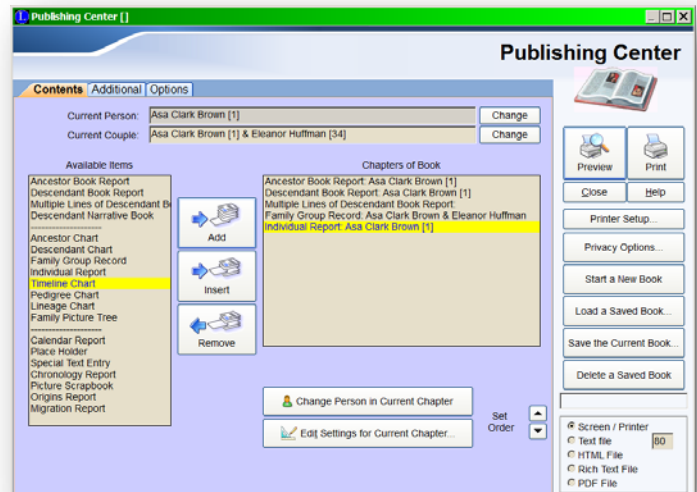
Address Labels	(Address: Labels)
Ages Report	(Age report)
Calendar Creator	(Calendar: Creator)
Calendar List	(Calendar: List-style)
Census Forms	(Census Forms: Printing)
Census List	(Census List)
Chronology Report	(Chronology: Report)
Event Report	(Event: Report)
Family File Information	(Family file: Information)
File IDs	(File ID Number: Report)
Individual List Report	(Name: List report)
Interviews	(Interview Report)
LDS Ordinances	(LDS: Ordinance reports)
Locations	(Location: Report)
Marriage Report	(Marriage: Report)
Merge Report	(Merge: Options)
Name Tags	(Name tags)
Picture List	(Picture: List report)
Potential Problems	(Potential Problems Report)
Relationships	(Relationship: Report)
Relationship Diagram	(Relationship: Diagram)
Scrapbook	(Picture: Scrapbook options)
Source Citations	(Sources: Citation report)

Surname Summary	(Surname: Summary report)
To-Do Research Log	(Research Log: Printing)
Trees Report	(Print: Tree list)
USA County Verification	(USA County: Verification)
Wall Charts	(Wall charts)

Legacy Publishing Center (Deluxe Edition)

You can create professional-looking books by assembling the various reports and charts available in Legacy into one single document.

This can include ancestor and descendant book reports, pedigree charts, family group records, picture scrapbooks and much more. You can also add a table of contents, other introductory sections and an overall index and list of source citations.



When you create a book, you select from the various items available and effectively add chapters to your new book arranged in the order of your choice.

Getting Started

► To create a new book:

1. Choose **Publishing Center** from the **Reports** tab of the **Ribbon** bar.
2. Click the **Start a New Book** button.
3. Enter a name for the new book. Select the file name and path to save the book files.
4. Select the various items to include in the book on the **Contents** tab.
5. Choose other sections to include in the book like Title Page, Copyright, Dedication, Preface, Abbreviations, Introduction, Source citation and Index options from the **Additional** tab.
6. Set any other options you want to use.
7. Set the **Privacy** options.
8. Click **Preview** to generate and view the book.



(Help index: **Publishing Center**)

Blank Forms, Questionnaires, and Research Logs

Forms Center

The *Forms Center* is the central repository for the many blank forms that are available in Legacy. These include a multitude of census forms, relationship diagrams, research forms, and more. As new forms are added, they will automatically be added to the *Forms Center* as you download new updates of Legacy. Many forms are available in several different languages.



The *Forms Center* is reached by clicking the **Forms Center** button on the **Reports** tab of the **Ribbon** bar.



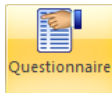
(Help index: **Forms center**)

Questionnaires

The Questionnaire is used when you want to get information about your family from another person. It is easy for another family member to simply fill in the blanks with what they know. You can customize the questionnaire to include specific information you want and how many children to prompt for.

► To print a questionnaire:

1. From the **Reports** tab of the **Ribbon** bar, choose the **Questionnaire** button.



2. Set the options and fonts you want.
3. Fill in the Opening and Closing paragraphs.
4. Click **Preview** or **Print**.



For complete information about Questionnaires, see the Legacy Help system and search the index for: **Questionnaire**

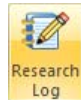
Research Log Blanks

A *Research Log* is simply a form where you can organize your research efforts. Use it to keep track of things you want to do when you go to different places in the future. You can track where things were found and where you want to look in the future.

Note: Legacy also has a powerful To-Do List that you can use to record and keep track of all the research tasks you want to do as you gather more information about your ancestors. See *To-Do List* on page 119 for more information.

► **To print one or more blank research logs:**

1. From the **Reports** tab of the **Ribbon** bar, choose the **Research Log** button.



2. Click **Preview** or **Print**.



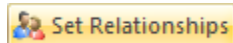
(Help index: **Blank research logs**)

Relationship Report

Legacy can show you how people are related to each other. The relationships are figured for the blood relatives of a source person. The spouses of aunts, uncles and cousins are also shown although they are not actually related. Once you initially build the relationships, Legacy tries to update new additions as you go. Before you can print a *Relationships* report, you must first make sure that the **Relationships** have been set:

► **To calculate relationships to a specific individual:**

1. From the *Family View*, make sure the individual you want to be the source person is in either the *Husband* or *Wife* box. From the *Pedigree View*, highlight the desired person.
2. From the **Tools** tab on the **Ribbon** bar, choose **Set Relationships**.



The *Set Relationships* window appears. Make sure the correct individual is shown as the *Source*.

3. Click the **Set Relationships** button. Legacy calculates the relationship of all blood relatives to the *Source* person (and a bit further to in-laws and spouses). The relationship is shown above the *Husband* and *Wife* boxes on the *Family View* and at the middle right of the *Pedigree View*.

(If you import individuals, or link to a family line, you will have to rebuild the relationships in order for them to all be updated.)

► **To print a Relationship report:**

1. From the **Reports** tab on the **Ribbon** bar, choose **Other Reports** and then choose **Relationship Report** from the dropdown list.
2. Check the settings.
3. Click **Preview** or **Print**.



(Help index: **Report printing options**)

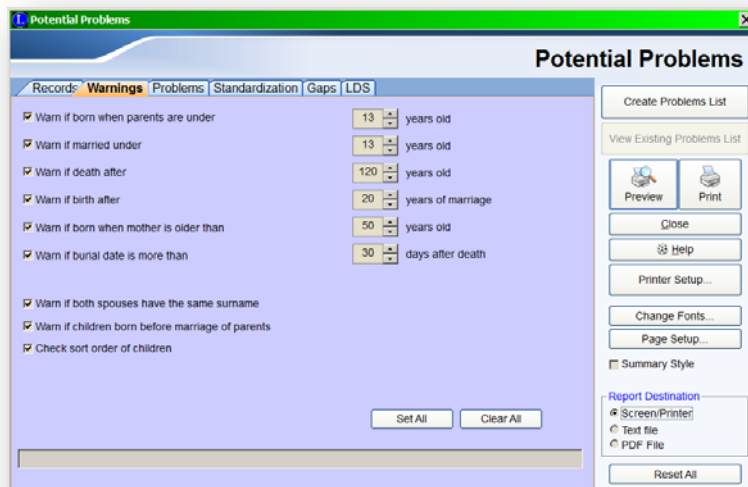



(Help index: **Relationship Report**)

Potential Problems Report

To create a *Potential Problems Report*, Legacy runs through your family file and checks the information it contains for some common and sometimes unnoticed discrepancies.

Some of the possible problems it finds may not be problems at all but they are not normally seen. If you are sure that a particular situation is correct, you can mark the record, telling Legacy to not report on it in the future.



Note: Legacy also checks for common problems while you are entering and edit information on the *Individual* and *Marriage Information* screens. When a problem is found, a  icon is displayed next to it. If you hover your mouse over the icon, a popup box shows you what is wrong. These problem icons are also shown next to the names displayed on the *Family* and *Pedigree Views* on the main screen.

► **To print a Potential Problems report:**

1. From the **Reports** tab on the **Ribbon** bar, choose **Other Reports** and then choose **Potential Problems** from the dropdown list.
2. Check the settings on the *Records, Warnings, Problems, Standardization, and LDS* tabs.
3. Click **Preview** or **Print**.



(Help index: **Potential problems**)

Records to Check

Specifies which records you want Legacy to check. See the online Help for more information on each option.

Warnings

These are situations that are probably problems with your dates, but in a few cases, may not be. For example, having a birth records before the parents were 13 years of age, or recording a death after the age of 120 years of age. Many of the warnings that Legacy checks for have a day or year range associated with them. You can change

these settings by using the **Up** and **Down**  arrows to change the associated value.

Problems

Checks for situations that are wrong, like recording a birth that is after the person's death date, or a burial that is before a death. Checking invalid dates is also done in this section.

Standardization

These are checks to ensure that you are not entering your information in non-standard ways. These include illegal characters in names, incorrectly formatted names, and other incorrect entries.

Gaps

These are checks for unusually short or long periods of time between certain events, like the time between the birth of subsequent children or the time between the marriage date and the birth of the first child. **Note:** There are options you can set so that gaps for living people, or after a certain year, are not reported as problems.

LDS

If you are keeping track of LDS information, these checks verify temple operational dates, and ordinance completion order.

Creating the List

When you have set all the options, click either **Preview** to see an on-screen view of the report before it is actually printed, or **Print** to have the report sent directly to the printer.

Print the Report

When you have set all the options, click either **Preview** to see an on-screen view of the report before it is actually printed, or **Print** to have the report sent directly to the printer.



(Help index: **Problems report**)

Creating a Problems List (Deluxe Edition)

Instead of printing the Potential Problems report, you can also create an interactive list of the problems found. This is done by clicking the **Create Problems List** button which displays the *Potential Problems List*.

This list shows the names and abbreviated descriptions for all of the problems found in the last problems search. As each name/problem is highlighted, the full problem description and suggested action is shown under the list at the bottom of the window.

The list is interactive in that you can edit the individuals and marriages right from the list to correct the problems or exclude them from future checking.

Name	Problem
Brown, Kenneth Wilmer [95]	Birth date more than 20 years after Marriage Date of Parents.
Brown, Mabel Claire [94]	Birth Date more than 20 years after Marriage Date of Parents.
Clark, Nathan [114]	Birth Date more than 20 years after Marriage Date of Parents.
Brown, [21]	Birth of first child too late after Marriage Date.
Brown, Myrtle Inez [30]	Birth of first child too late after Marriage Date.
Brown, Charles [11]	Child 11 born too long after previous child
Goos, Hanna E. [9]	Child 2 born too long after previous child
Puhler, Fredrick [175]	Child 2 born too long after previous child
Clark, Abel [105]	Child 2 born too soon after prev child
Brown, William C. Reverend [74]	Child 3 born too long after previous child
Goos, Frederick [7]	Child 3 born too long after previous child
Brown, Mine Viola [64]	Child 3 born too soon after prev child
Brown, William Clark [166]	Child 5 born too soon after prev child
Brown, Kenneth Wilmer [95]	Child 7 born too long after previous child
Clark, Nathaniel, Captain [103]	Children not sorted in chronological order
Cummings, Mary [104]	Children not sorted in chronological order
Sarah [117]	Marriage date is bad

Name: Kenneth Wilmer Brown [95]
 Problem Text: pm. 1 Jan 1868 and b. 2 Apr 1889
 Problem: The birth date is more than 20 years after the marriage of the parents.
 Suggestion: Verify the date of birth.

If a problem involves individual information for a person and you would like to edit that information, highlight the person's name and problem in the list and then click the **Edit Individual** button. The person's Individual Information screen appears where you can make changes. If the problem has to do with marriage information, click the **Edit Marriage** button to display the Marriage Information screen.

If you find that a reported problem is not really a problem, you can mark it as "Not a Problem" and have it excluded from lists generated in the future. Make sure the desired problem is highlighted in the list and then click **Mark as Not a Problem**. The marked and removed from the list.

Printing a Report

Three report formats are available when printing the problems list:

Detailed – Includes the name, description, dates, and suggested action for each problem.

Abbreviated – Includes only the name and description (on two lines) for each problem.

Summary – Includes only the name and short description (on one line) for each problem.

After you have select the desired report format, click either the **Preview** button to see an on-screen view of the report before it is actually printed, or click **Print** to have the report sent directly to the printer. (See **Printing the Report** on page 131 for more output options.)

Formatting Options

You can customize the look of the report by setting the format options. Click **Page Setup...** to change the margins, page orientation, line spacing and print size. (See Page Setup for more information.) Click **Change Fonts** to select the font size and style for the report.

Saving the List

The Potential Problems List is kept from session to session so that it doesn't have to be generated each time you want to view it. To display the list, click the **View Existing Problems List** button on the previous *Potential Problems Report* screen.

Creating a New List

If you want to create a new problems list, either for a different set of individuals or with different options selected, click the **Create Problems List** button on the previous *Potential Problems Report* screen. Any previous list is erased and the new list takes its place.

LDS Ordinance Report

The *LDS Ordinance* reports show each selected individual along with each individual's ordinance information. This includes the individual ordinances of baptism and endowments, as well as all sealing information for spouses, children, and parents.

► **To print an LDS Ordinances report:**

1. From the **Reports** tab on the **Ribbon** bar, choose the **Other Reports** button and then choose **LDS Ordinance** from the dropdown list
2. Select the **Records to Include**.
3. Set any other desired options.
4. Click **Preview** or **Print**.



(Help index: **LDS ordinance reports**)

Calendar Creator (Deluxe Edition)

Create your own calendars, complete with pictures, birthdays, and anniversaries. There are options to include a cover picture (front and back), picture pages above each calendar month, and complete control over color, layout, shadows, fonts, page size, etc. Create complete yearly calendars suitable for gifts. The calendars can be blank or include the birthdates and anniversaries of your family file members.

► **To print a Calendar report:**

1. From the **Reports** tab of the **Ribbon** bar, choose **Other Reports** and then choose **Calendar Creator** from the dropdown list.
2. Select the records you wish to include.
3. Set any other desired options.
4. Choose the year to print.
5. Choose the months to print.
6. Select the type of calendar to print, and which fields to include.
7. Click **Preview** or **Print**.





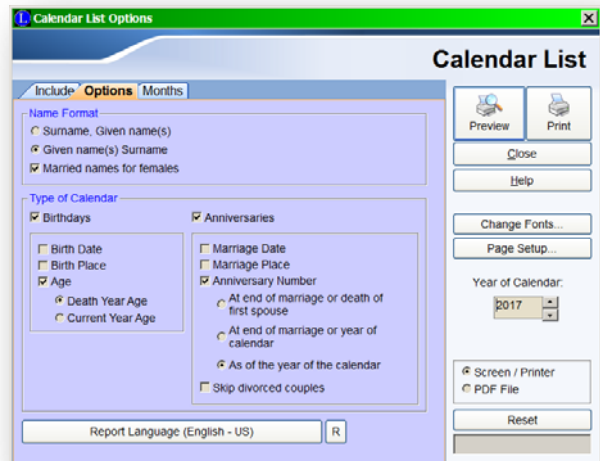
(Help index: **Calendar Creator**)

Calendar List

A *Calendar List* report can be printed to show selected birth dates and anniversaries.

► To print a Calendar List report:

1. From the **Reports** tab of the **Ribbon** bar, choose **Other Reports** and then choose **Calendar List** from the dropdown list.
2. Select the records you wish to include.
3. Set any other desired options.
4. Choose the year to print.
5. Choose the months to print.
6. Select the type of calendar to print, and which fields to include.
7. Click **Preview** or **Print**.



(Help index: **Calendar List report options**)

Interview Report (Deluxe Edition)

The *Interview Report* contains over 1200 questions in thirteen different categories that can be used when you interview a family member. They are great at jogging the memory of the person being interviewed and elicit more in-depth responses.



► **To print an Interview report:**

1. From the **Reports** tab of the **Ribbon** bar, choose **Other Reports** and then choose **Interview Questions** from the dropdown list.
2. Select the Type of interview you want to do.
3. Select the Topics you want to cover.
4. Select the Questions you want to ask.
5. Design the Cover Page.
6. Check over the Permission page.
7. Set any other desired options.
8. Click **Preview** or **Print**.

Surname Summary Report

A *Surname Summary* report summarizes all the surnames in the current family file, showing how many times each name is used and what date range it spans.

► **To print a Surname Summary report:**

1. From the **Reports** tab of the **Ribbon** bar, choose **Other Reports** and then choose **Surname Summary** from the dropdown list.
2. Set the Soundex Code option if desired.
3. Click **Preview** or **Print**.



(Help index: ***Report printing options***)

Source Citation Report

The *Source Citation* report displays each master source, followed optionally by the individuals who have cited them. The specific events that use each source can also be included in this report, along with the citation detail, surety level, and source quality analysis. You can print all master sources or just those that are tagged or untagged.

► **To print a Source Citation report:**

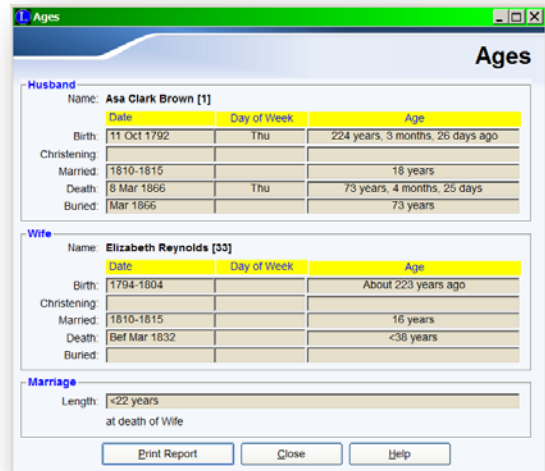
1. From the **Reports** tab of the **Ribbon** bar, choose **Other Reports** and then choose **Source Citation** from the dropdown list.
2. Choose which sources to include.
3. Set any desired options.
4. Click **Preview** or **Print**.



(Help index: ***Source citation report***)

Age Report

The *Ages* report shows how old individuals are at certain events in their lives. The display shows three columns: Date, Day of Week, and Age. The *Date* column shows the date of the event, the *Day of Week* column shows what day of the week the event occurred, and the *Age* column shows how old the person was when the event occurred. The *Marriage* box at the bottom shows how long the couple was married. The earthly marriage is considered at an end when either of the persons has died, or on the date entered in the *Marriage Status Date*, if any. This is usually due to either a divorce or annulment.

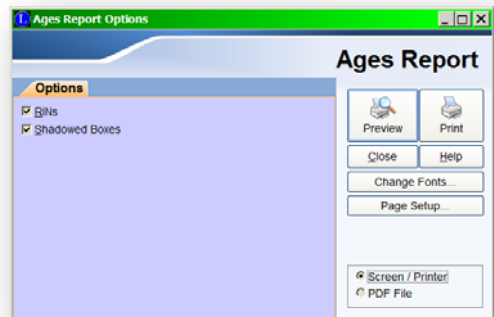


- ▶ **To view the Ages window:**
From the **View** tab of the **Ribbon**



bar, choose **Ages**.

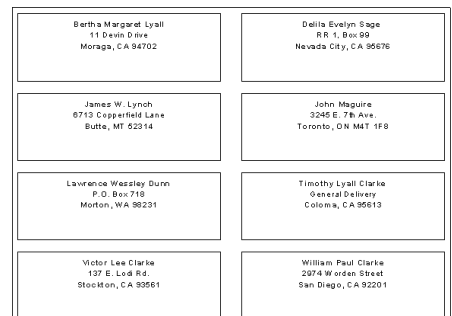
- ▶ **To print the Ages report:**
 1. Click **Print Report** at the bottom of the *Ages* window.
 2. Set any desired options.
 3. Click either **Preview** or **Print**.



(Help index: **Ages**)

Address Labels

You can print address labels in Legacy. The mailing labels are handy for holiday mailings and research contacts at archives and libraries.



► **To print address labels:**

1. From the **Reports** tab of the **Ribbon** bar, choose **Other Reports** and then choose **Address Labels** from the dropdown menu.
2. Choose which records to print.
3. Choose which fields to print on the labels.
4. Select borders and pictures, if desired.
5. Select a label type, or set the specifications for a custom-size label.
6. Make other adjustments as needed for margins, indentations, and line spacing.
7. Click **Print** or **Preview**.



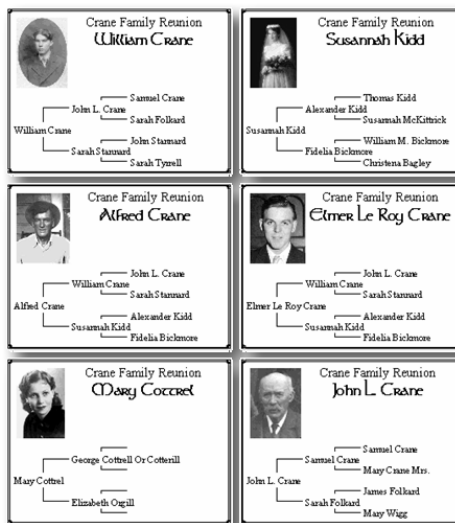
(Help index: **Name tags and address labels**)

Name Tags

You can print name tags in Legacy for family reunions and clan gatherings. The labels can include the name of the event, a picture of each individual (or a common picture), the date, and the guest's name with a miniature pedigree chart to help others see how they are related.

► **To print name tags:**

1. From the **Reports** tab of the **Ribbon** bar, choose **Other Reports** and then choose **Name Tags** from the dropdown list.
2. Choose which records to print.
3. Select which fields you want to print on the tags.
4. Select borders and pictures, if desired.
5. Select a name tag type, or choose the specifications for a custom-size name tag.
6. Make other adjustments as needed for margins, indentations, and line spacing.
7. Click **Print** or **Preview**.

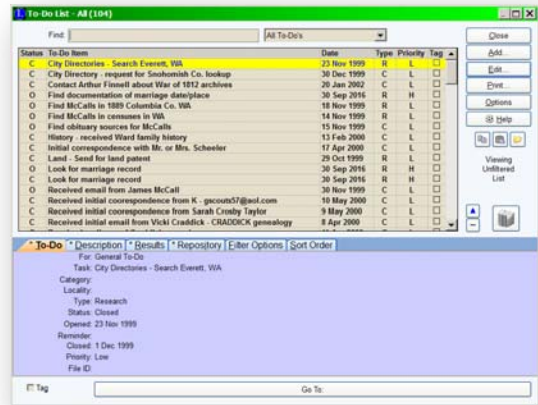


(Help index: **Name tags and address labels**)

To-Do Report

► To view the To-Do Report window:

1. From the **View** tab of the **Ribbon** bar, choose **To-Do List**. This displays the *To-Do List* window.
2. Choose whose To-Do list to print.
3. Click **Print**. The *Print To-Do List Report Options* window appears.
4. On the **Record Selection** tab, choose the type of To-Do items you want to print.
5. On the **What to Include** tab, choose the pieces of information you want to include on the report.
6. On the **Filter Options** tab, choose the types of To-Do items you want to limit the report to.
7. On the **Sort Order** tab, choose how you would like the report arranged.
8. To print the report, click **Preview** or **Print**.



The To-Do Report can also be reached from the **Ribbon** bar. From the **Reports** tab, choose **Other Reports** and then choose **To-Do Report** from the dropdown list.



(Help index: **Print To-Do list**)

Event Report (Deluxe Edition)

► To Print the Events Report:

1. From the **Reports** tab of the **Ribbon** bar, choose **Other Reports** and then choose **Event Report** from the dropdown list.
2. On the **Include** tab, choose who and what you want to print.
3. On the **Options** tab, select from the various formatting styles.
4. On the **Filter** tab, choose any options you want in order to narrow down the events printed.
5. To print the report, click **Preview** or **Print**.



(Help index: **Event report**)

File IDs Report

There are four types of records in Legacy that accept a File ID#. These are Master Sources, Source Citation Details, To-Do items, and Multimedia items (picture, sound, and video files). You can use these fields to create a filing system linking your family file records with printed source documentation, printed pictures, and other physical items that you want to store for the future.

The File ID Number Report lists all the numbers that you have in your family file and shows where they were used.

► **To generate the File ID Number Report:**

1. From the **Reports** tab of the **Ribbon** bar, choose **Other Reports** and then choose **File ID** from the dropdown list.
2. Select the desired reports options (described below).
3. Click either **Print** or **Preview** to view the report.



(Help index: ***File ID Number Report***)

Location Report

The Location report displays each master location, followed by the individuals and marriages that use them.

► **To print the Location Report:**

1. From the **Reports** tab of the **Ribbon** bar, choose **Other Reports** and then choose **Location Report** from the dropdown list.
2. Select locations to print and who uses them from the **Include** tab
3. Check the pieces of information to be added to the report on the **Options** tab.
4. Click either **Print** or **Preview** to view the report.

Chapter 8

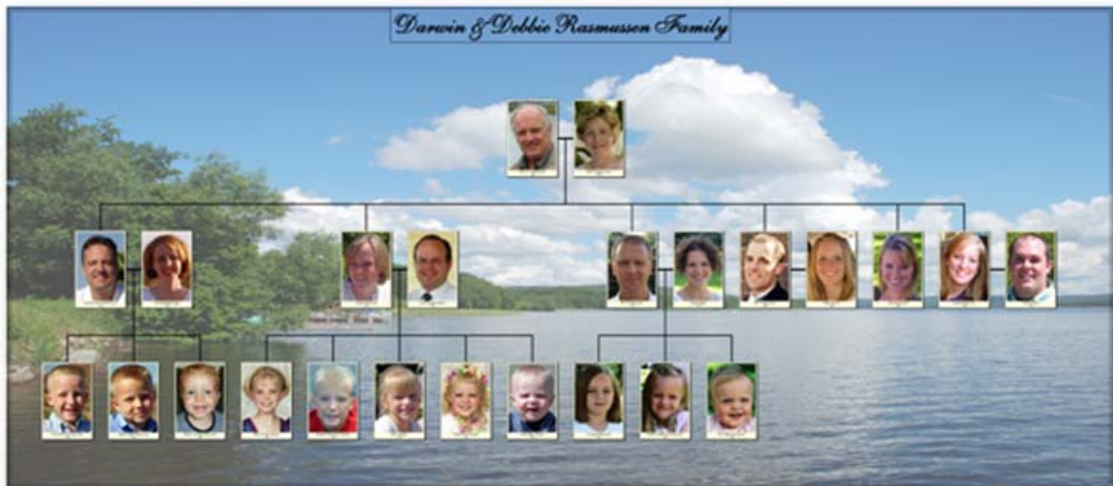
Wall Charts

Full-Color Masterpieces that you can be proud of

Legacy Charting Overview

You have spent many long hours collecting and entering your family history. A feat that few other people even attempt, let alone accomplish in their lifetimes. Now you can experience the enjoyment of showing off your family tree by producing stunning full-color wall charts. Use them for your next family reunion or for a deserving wall in your home. Wall charts make great gifts for any holiday, birthday, or anniversary. They also make your own continuing genealogy research easier by having a large, easily readable working chart nearby to refer to.

Wall charts tell a story that can be seen at a glance. They are a graphical representation of your family that can extend forward or backward for many generations. Large charts are often a gathering place for conversations that bond your family together. They become family heirlooms of great importance that will be passed on into the future. So, show off all your hard work – print some wall charts!




Starting the Wall Chart

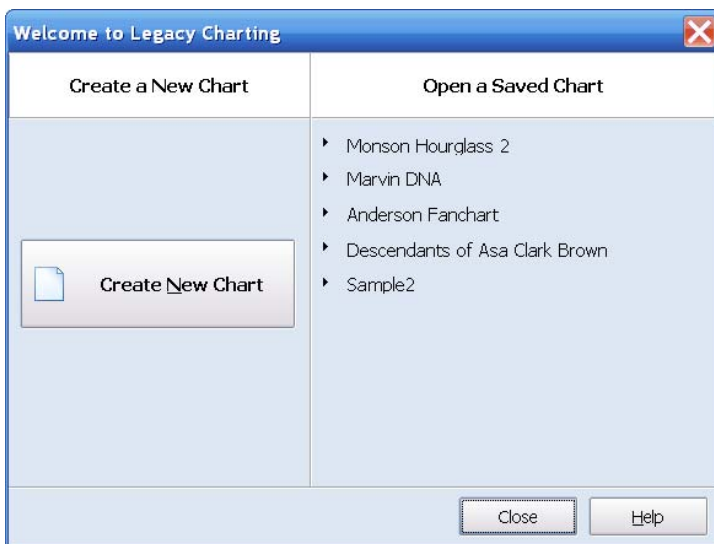
The easiest way to start a Wall Chart is to open Charting from within Legacy.

1. In Legacy open the file you want to use to make a Chart
2. Navigate to the starting person for your Chart.
3. On the Report Ribbon Tab choose Legacy Charting
4. Choose the type of Chart you want to create. (Step 2 of 3 after an incredibly long Step 1) then skip step 3 of 3 as it also has been done before clicking Legacy Charting.

5. Edit the chart.

You can also start Legacy Charting from outside the Legacy program. When Legacy is installed, a shortcut  is placed on your Desktop to make it easy to start the program. Simply double-click the **Charting** icon to open the program. You can also click on the **Start** button on your desktop and then choose **Legacy Charting** from the menu to start the program.

When you first start Legacy Charting, the *Welcome to Legacy Charting* window appears where you can open an existing chart or start a new one.



Opening a Saved Chart

If you have previously saved some chart files, a list of up to the last ten charts are displayed on the right side of the Welcome screen. To open one, click on the name of the file. Legacy Charting opens the chart file and displays it on the screen.

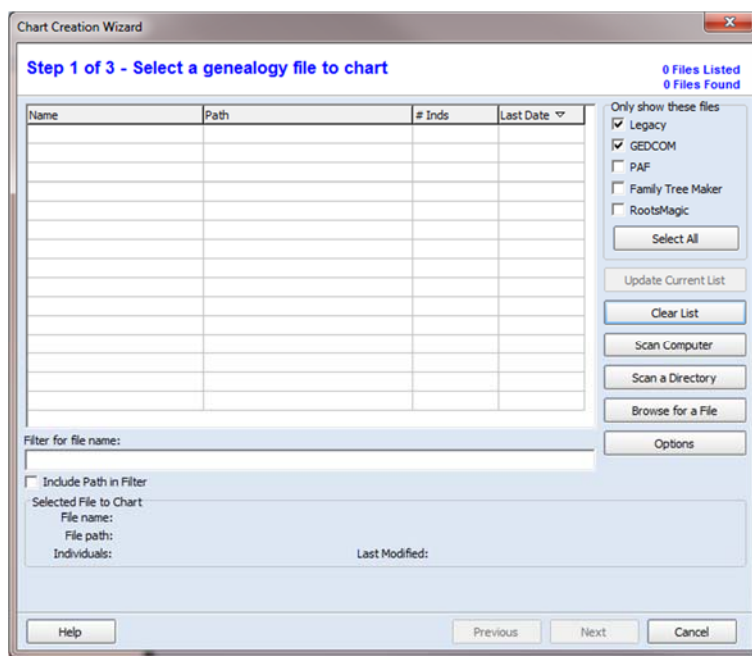
Starting a New Chart

To start a new chart, click the **Create New Chart** button. This starts the *Chart Creation Wizard*.

Chart Creation Wizard

The *Chart Creation Wizard* consists of two or three easy steps: If you are starting Charting by using the desktop icon (as opposed to starting it from within Legacy), the first step is to select the family file or GEDCOM file from which you want to create the chart. Second, (or first if you have started from within Legacy), choose the type of chart you want to create. And third, choose the individual from that file to start the chart from.

Step 1 of 3: Select a genealogy file to chart



You can either have Legacy Charting scan your entire computer to find files to load, or you can browse for them yourself.

Scanning Your Computer

Legacy Charting can create charts from several different types of files. These include Legacy Family Tree, Personal Ancestral File, Family Tree Maker, RootsMagic and GEDCOM files. To begin, click **Scan Computer for New Files**. The scanning process can take several minutes to search your entire computer. The time involved depends on the speed of your computer, the size of your hard drives, and how many qualifying files are found. When the process is complete, a list of the files found is displayed in the grid.

While scanning, Legacy Charting collects all the file names for all the supported file types. When the resulting list is displayed, the file types shown depend on the filtering options you have selected. Please see **Filtering the List** below to see how this works.

The file list includes the name of the file, the path where it is located on your computer, how many individuals are contained in the file, and the date the file was last accessed.

The list of files is retained even when you quit Legacy Charting. When you start again, the list is still there. If you create additional family files or receive new GEDCOM files, you can have them added to the list by clicking **Scan Computer for New Files** again.

Sorting the List

You can sort the file list by any of the four columns by clicking on the desired column heading. The first time you click the column, the list is sorted in ascending order as indicated by a small up-pointing triangle next to the column name. If you click the column heading a second time, the sort order is changed to descending, as shown by a down-pointing triangle.

Filtering the List

Use the checkbox options in the **Genealogy File Types** box to include specific types of chartable files in the file list. To just display Legacy files, select the **Legacy** option and clear the rest. To include Legacy and GEDCOM files, put checkmarks in both options. To show all possible files, select all the types.

In the upper-right corner of the window there are two indicators. The top line shows how many files are currently being shown in the list (with the current filters) and the lower line shows how many files Legacy Charting found when it did its last scan. As you change filter options you can quickly see how many files are in the list.

There is another filter that can be used to narrow the list down further and help you to find specific file names. You can type characters into the **Filter for file name** text box to limit the list to file names containing those characters. There are two options below the text box, **Starts With** and **Include Path in Filter**. If neither of these options is selected, the file names included in the list will have the filter characters located anywhere within the names of the files. For example, if you enter "er" then files with names like **Ernhart**, **Rymer**, and **Fern** are included. If you select the **Starts With** box, only **Ernhart** is displayed. Selecting the **Include Path in Filter** option expands the search to include the **Path** column as well as the **Name** column.

Update File List

When Legacy Charting scans your computer for chartable files, it looks at each file to see how many individuals it contains. If you later add new individuals, or delete some, you

can have Legacy Charting recheck the files in the list to update the numbers by clicking the **Update File List** button.

Clearing the List

If you would like to clear the file list, click **Clear List**.

Selecting a File to Chart

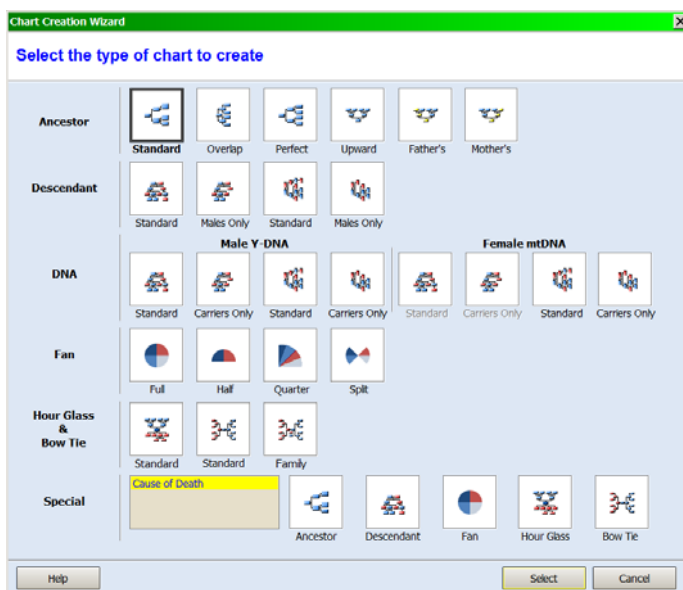
To select one of the files in the list to chart, click on the name to highlight the line and then click the **Next** button. You can also double-click the file to choose it and automatically move to the next step.

Browsing for a File Yourself

If you don't want to use the scanning feature of Legacy Charting, or if you don't want to wait for a new scan to pick up a new file (on a flash drive for example), you can find the file manually by clicking **Browse for File**. This opens a standard **Open** dialog box where you can select the drive, folder, and file you want to chart. When you select a file in this manner, you are then taken to step two.

Step 2 of 3: Select the type of chart to create

Legacy Charting offers several different styles of charts to choose from. These include Ancestor, Descendant, DNA, Fan, Hour Glass, and Bow Tie charts. Many of these charts have variations in spacing and layout giving you 30 distinct charts.



To select a chart type, click on the desired format and then click the **Select** button. You can also just double-click on a chart button to select it.

After selecting a chart, Legacy Charting generates the chart, starting with the person you selected and automatically selecting 5 generations. From here you can change many aspects of the chart, including size, color, spacing, content, and much more.

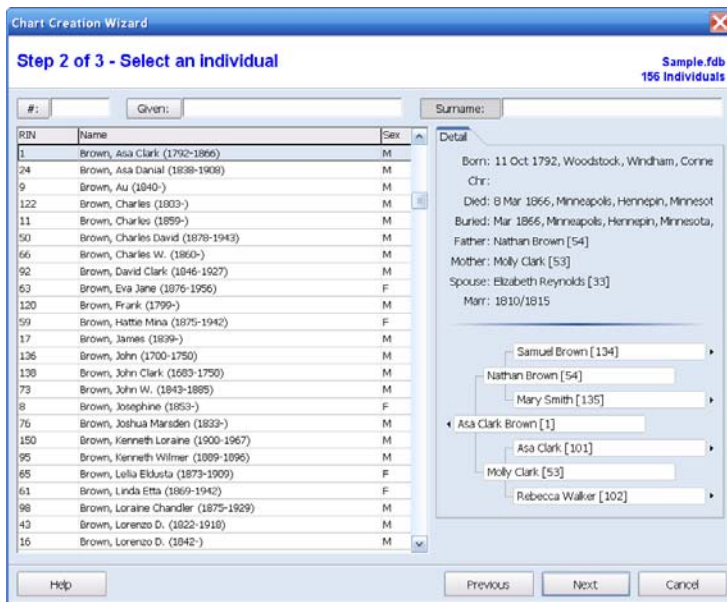
Step 3 of 3: Select an individual

The third step of the *Chart Creation Wizard* is to select the starting individual for the chart. A list of all the individuals in the file is displayed.

What is Shown

The name list shows the record identification number (RIN), the name, and the gender of each individual in the file.

To the right, on the **Detail** tab, dates and location are displayed for the individual along with the names of the parents and spouse. Below this information is a three-generation pedigree chart that begins with the current person and includes his or her parents and grandparents (if they are in the file).



Navigating the Pedigree Chart

The pedigree chart can be navigated up and down. Clicking on any name moves that person to the starting position in the middle. You can navigate down by clicking the left-arrow to the left of the starting person. The first child of that person is displayed. You can also move to the right (to older generations) by clicking the right-arrows to the right of the four grandparents.

Sorting the Name List

The name list can be sorted into RIN, Given Name, or Surname ascending order by clicking the #, Given, and Surname buttons at the top.

Searching for a Name

You can search for a name in the list by entering a RIN, Given Name, or Surname into the appropriate text box at the top. As you type, the highlight in the list jumps to the nearest matching name.

Selecting the Starting Individual

To select a person as the starting individual for the chart, click on the desired name to highlight it, and then click **Next** to move to the final step. You can also double-click on the name to select it and automatically move to the last step.

The Legacy Charting Screen

Ancestors of Loraine Chandler Brown

Nathan BROWN
 b: From 1755 to 1765 in Of Woodstock, Windham, Connecticut, United States
 m: 13 Nov 1791 in Pomfret, Windham, Connecticut, United States

Asa Clark BROWN
 b: 11 Oct 1792 in Woodstock, Windham, Connecticut, United States
 m: 08 Mar 1832 in Tionesta, Venango, Pennsylvania, United States
 d: 08 Mar 1866 in Minneapolis, Hennepin, Minnesota, United States

Molly CLARK
 b: 07 Mar 1765 in Pomfret, Windham, Connecticut, United States

David Clark BROWN
 b: 24 Nov 1846 in Deerfield, Warren, Pennsylvania, United States
 m: 01 Jan 1868 in Brockway, Stearns, Minnesota, United States
 d: 09 Feb 1927 in Everett, Snohomish, Washington, United States

Elesnor HUFFMAN
 b: 11 Jan 1803 in Kingston, Frontenac, Ontario, Canada
 d: 03 Jun 1874 in Saint Cloud, Stearns, Minnesota, United States

Loraine Chandler BROWN
 b: 08 May 1875 in Saint Cloud, Stearns, Minnesota, United States
 d: 17 Jan 1929 in Sipoco, Luzon Island, Phillipine Islands

Jonathan CROSBY

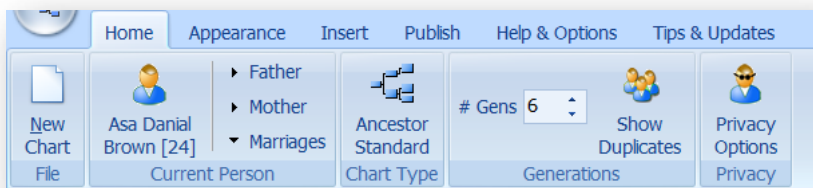
Clara Etta CROSBY
 b: 13 Mar 1850 in Swarville, Waldo, Maine, United States
 d: 04 Sep 1928 in Everett, Snohomish, Washington, United States

Sarah SMART

File: E:\Sample\Sample.fdb | Inds: 9 | Pages: 1 | Size: 8.50" x 11.00" | Zoom: 100%

The main charting screen displays the chart you are working on. It is shown in the central portion of the window. Besides showing the current chart, the Legacy Charting screen offers many tools, options and commands that you can use to change and enhance the chart you are creating. You can change the starting person of your chart as well as the chart type. Charting has built-in themes that you can use to quickly change the look and feel of your chart. Many pre-defined color schemes are also available along with various borders and shadow effects. Pictures can be placed within the individual boxes as well as on the background of the chart. You can print your chart on your own printer or export a file that can be printed on a large-format plotter to create professional wall charts.

The Charting Ribbon



The Charting Ribbon is designed to help you quickly find the commands that you need to complete a task. Commands are organized in logical groups, which are collected together under tabs. Each tab relates to a type of activity, such as chart appearance or publishing. To reduce clutter, some tabs are shown only when needed. For example, the **Picture Settings** tab is only displayed when you have a picture selected.

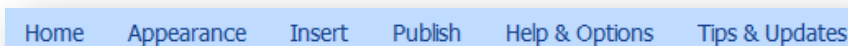
How it Works

Quick Overview

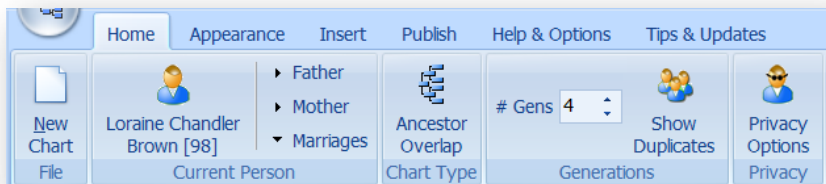
Clicking on a tab heading (Home, Appearance, Insert, Publish, or Help & Options) displays the *gallery* of options for that tab. To select an option, click on it. Most options then display a dialog box where you can choose what you want. For example, a color, a box item, the box sizes, the title of the chart, and many more.

Always keep the Ribbon minimized

To minimize the Ribbon, right-click on any option on it and then choose **Minimize the Ribbon**.



The Home Tab of the Ribbon



Home Tab

The **Home** tab is part of the main Ribbon of Legacy Charting. (See [The Ribbon](#) for more information on how to use this main toolbar.)

File

Starting a New Chart


Click **New Chart** to create a new chart. This starts the three-step *Chart Creation Wizard* taking you through the process of selecting a file, starting individual, and chart type. If you have been working on a chart, you are prompted to save it before the new chart is created. (See [Chart Creation Wizard](#) for complete instructions on using the wizard.)



Current Person

Selecting the Starting Person

If you want to change the starting person of your chart, click **Select Individual** in the *Current Person* section. This is the button on the left side

of the section with the  icon. This opens the *Chart Creation Wizard* where you can change to any person in the family file you are working with. When you return, the chart is redrawn with the new starting person. Note that if you have customized the chart by moving boxes around and resizing them, the new chart will revert to the default layout. Any color changes that you have made will remain in effect.



Changing the Starting Person by Navigating

You can change the starting person of your chart to the father, mother, spouse, or child of the current starting person by clicking on **Father**, **Mother**, or **Marriage**. Clicking **Marriage** displays the spouses and children of the current person where you can select who you would like to change to.

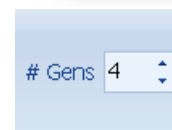
Changing the Chart Type

The current chart type is shown above the **Chart Type** label. To select a different type, click the current chart type button. You can choose from the eighteen chart types available. When you choose a new type, the chart is redrawn.



Changing the Generations

When first displayed, your chart is built out to five generations. If you want more or fewer generations, you can change the setting by using the up and down arrows or by typing the desired number of generations and pressing **Enter**.



Privacy

Suppress private individuals

Selecting this option removes any person who is marked as Private from the chart. Any line of people extending from the Private person is also removed.



Suppress invisible individuals

Anyone who is marked as invisible will be excluded from the chart as if the person did not exist. Thus any ancestor or descendant lines that would have continued from this person are also excluded.

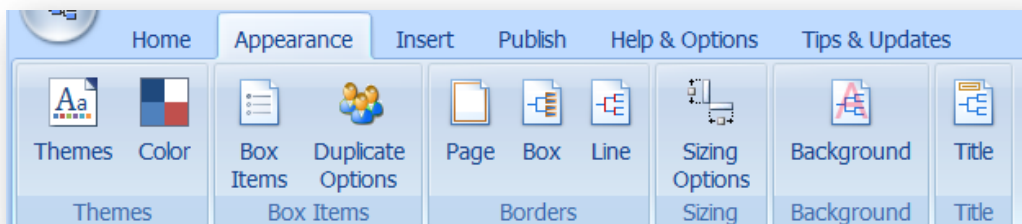
Suppress private information [[Private]]

Any information that is marked as **Private**, using the [[and]] markers, is removed from the boxes.

Suppress details for living people

If a person is marked as being alive, only their name is shown in the box. If you would like to have the name changed to "**Living**," select the **Use "Living" instead of their name** option.

The Appearance Tab of the Ribbon



The **Appearance** tab is part of the main Ribbon of Legacy Charting. (See [The Ribbon](#) for more information on how to use this main toolbar.)

Themes

Themes

Legacy Charting has many pre-defined themes that you can use to format your chart. A theme includes a coordinated combination of fonts, colors, and borders to achieve a certain look. You can load a theme, alter it to your liking and then save it as a new theme. Themes include box colors, box gradients, box spacing, line colors, box content, borders, and fonts. Box sizes, generation settings, rearrangement of boxes or generations, and starting individuals are not included in a theme.

Because of the different layouts of each kind of chart, themes are specific to each chart type. A theme from one type of chart cannot be applied to a different chart type.



To select a theme, click the **Themes** option to open the *Chart Themes* box. You can select any existing theme by either clicking on the theme name to highlight it and then clicking on **Apply Theme to Chart** in the **Actions** section below the theme list, or by double-clicking the theme name. When you select a new theme, the chart is immediately redrawn with the new options.

Actions

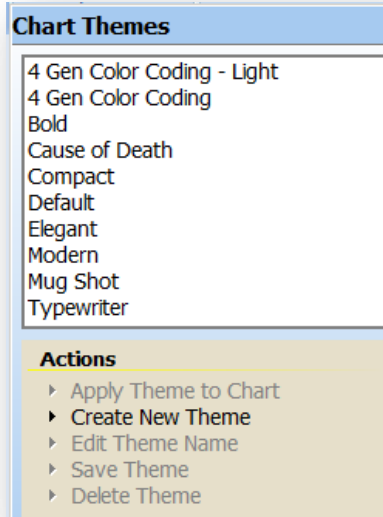
Apply Theme to Chart – Applies the currently selected theme to the current chart.

Create New Theme – Prompts you for a theme name and then creates a new theme with the current chart layout and settings.

Edit Theme Name – Prompts you for a new name for the currently selected theme.

Save to Theme [theme name] – Saves all the currently settings to the current theme. This is how you change the setting for a theme in the list – Select the theme, make any desired changes, and then **Save** the theme again.

Delete Theme [theme name] – Deletes the current theme (after prompting for confirmation).



Colors

Legacy Charting has many pre-defined color themes you can choose from while formatting your chart. These include themes for coloring by generation, ancestral line, and by gender.

To select a color theme, click the **Color** option to open the *Color Themes* box. Click the type of color formatting you want to use – either **By Generation**, **4 Colors**, **DNA X Chromosome**, or **Gender**. Click the specific color theme you want to use and then click **Apply Color Theme to Chart** in the **Actions** section. (You can also just double-click the desired color theme.) The selected theme is then instantly applied to your chart.

Actions

Apply Color Theme to Chart – Applies the currently selected color theme to your chart.

Edit Color Theme Name – Prompts for a new name for the currently selected color theme.

Save to Color Theme [theme name] – Saves all the current color settings to the current color theme. This is how you change the colors for a theme in the list – Select the theme, make any desired changes, and then **Save** the theme again.

Delete Color Theme – Deletes the current theme (after prompting for confirmation).



Color Themes

Use No Color Theme

By Generation ▼

Colors 11
 Colors 12
 Colors 13
 Colors 14
 Colors 15

Actions

- ▶ Apply Color Theme to Chart
- ▶ Edit Color Theme Name
- ▶ Save As
- ▶ Delete Color Theme

Edit Current Chart Colors

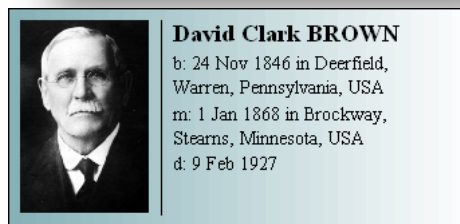
Fill Color	Outline	Font
Color 1		
Color 2		
Color 3		
Color 4		
Generation 5		

Use Gradient Fill Left to Right ▼

Save Above Colors as a New Color Theme

Gradient Fill

You can change the solid colors to gradient filled colors by selecting the **Use Gradient Fill** option. This fills the boxes with the color fading from left to right.




Box Items



The default information to be included in a chart box is the name, birth date and place, marriage date and place, and death date and place. In addition to these fields, you can also include the christening and burial information as well as the lifespan of the individuals.





Adding an Item

To include a new item of information in the chart boxes, highlight the desired item in the **Available Items** list and then click the  button to copy it to the **Items to Display** list.

Deleting An Item

To remove an item, highlight it and then click the  button. You can also delete all the items at once by clicking the  button.

Moving an Item in the List

You can move an item up or down in the list to rearrange the order of the items in the chart boxes. To do this, highlight the item you want to move and then use the up  and down  arrows to move it.

Formatting the Items

Each item that you include in boxes can be customized using the *Item Options* to the right of the *Items to Display* list. Names can be formatted in several different orders; birth, christening, death, and burial information can exclude the locations; items can be preceded by labels; and the fonts and font sizes can be changed.

Settings

Each item can be placed in one of three columns within a box. If everything is placed within one column, that column will expand to occupy the entire width of the box. If items are placed in the left column and right column with nothing in the center column, the two used columns will expand to each occupy half of the width of the box. If items are placed in the left and middle columns, the middle column will expand to occupy two-thirds of the box. And finally, if only the middle and right columns have items, the middle column will expand to take up the left two-thirds.

Duplicate Options

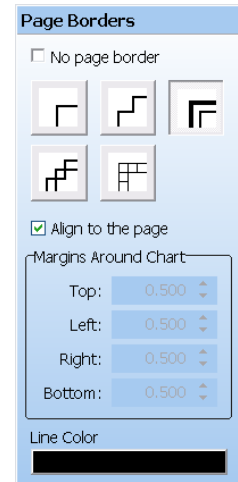
Allows you to select the font attributes for duplicate line boxes.

Borders



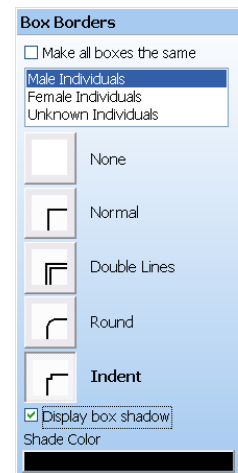
Page Borders

Select from five chart borders by clicking on the desired style. (If you don't want a border, select the **No page border** checkbox.) The borders are fancy lines that encircle the entire chart. The borders can either be out at the page edges (select the **Align to the page** checkbox) or held in close to the actual chart itself. When held close to the chart, you can choose the margin distance. You can also select the line color of the border by clicking the color box below **Line Color**.



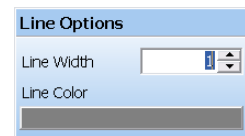
Box Borders

The lines surrounding each person's box can be selected from the four available styles (or turned off). You can select different box styles for males, females, and people of unknown gender. Box shadows can be added.



Lines

The width and color of the lines that connect the boxes together can be changed.



Sizing

Box Width

You can change the width of all the boxes by dragging the slider control to the left or right. This changes all the boxes on the chart. Boxes can be sized from 1/2 of an inch up to six inches wide which is desirable when creating large wall charts.

Sibling Spacing

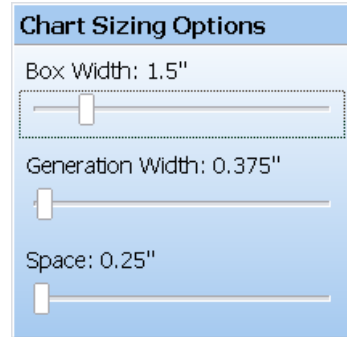
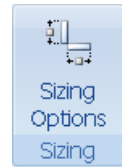
If you are creating a descendant chart, you can adjust the spacing between adjacent siblings.

Generation Width

The horizontal spacing between the generation columns can be increased or decreased, varying from 1/8 of an inch up to six inches.

Box Spacing

The vertical spacing between the boxes can be increased or decreased from 1/16 of an inch up to six inches.



Background

You can select a solid-color to fill the background of the chart or any image can be used. When using an image, you can adjust the transparency to fade the picture lighter.



When adding an image to the background, you have several options as to its placement:

Tile – The image is repeated at its full size until the entire background is filled. This is best used with a background image that was meant to fit together as a continuous pattern.

Center with no stretching – The picture is placed at its full image size once in the middle on the chart.

Center and stretch – The picture is enlarged proportionally until it is either the same width or same height as the chart.

Stretch to Frame – The picture is stretched both ways until it fills the entire chart background area. This option is used the most when placing a background image. You should take into account the shape of the picture so that you don't place a tall, narrow picture on a short, wide chart, as the stretching effect will be very noticeable. In most cases, however, the stretching is visually acceptable.

Picture Resolution

Keep in mind that pictures used on a wall chart are generally larger than those you might see in a book or other page-sized report. If your pictures are low-resolution, they will probably look very grainy and jagged when enlarged on your wall chart. You should use the highest resolution you can when selecting pictures. This is especially important for pictures that are being enlarged for use as the background of the chart.

You can also use both a color and an image. The color will colorize the image more and more as you adjust the transparency more to the right.

Title & Legend

You can add, change, or remove a title and legend to the chart.

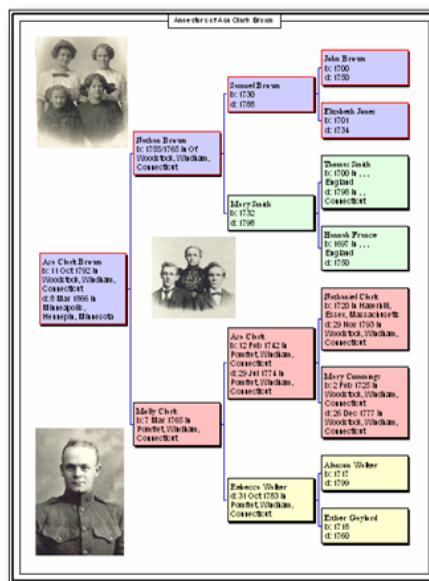
The Insert Tab of the Ribbon

Insert Tab

The **Insert** tab is part of the main Ribbon of Legacy Charting. (See [The Ribbon](#) for more information on how to use this main toolbar.)

Picture

One or more pictures can be placed in the background of the chart. These pictures lie in a layer that is behind the chart boxes. You can stretch these pictures to any size, even filling the entire background area of the chart. Pictures can be cropped, rotated, converted to black and white, and faded. Adjustments can be made to the brightness, contrast and saturation of the pictures. Drop shadows can also be added. (When you make these types of



changes, you are working with a copy of the picture. The original is not changed.)

Picture Resolution

Keep in mind that pictures used on a wall chart are generally larger than those you might see in a book or other page-sized report. If your pictures are low-resolution, they will probably look very grainy and jagged when enlarged on your wall chart. You should use the highest resolution you can when selecting pictures. This is especially important for pictures that are being enlarged for use as the background of the chart.

Stretching a Picture

When you click on a picture, eight handles appear around the edge of the image that you can use to change its size. The handles in the corners, when dragged, increase or decrease the picture size while maintaining the current aspect ratio (width and height proportions). The handles on the middle of each side are used to stretch the image vertically or horizontally. In other words, it will pull the picture out of its original proportions, making the picture, and the things or people within it, fatter or taller.

Text

One or more text boxes can be placed and moved to any position to enhance and describe the various parts of your chart. The fill and text color can be changed and the box border lines can be adjusted or removed. Drop shadows can also be added.



Mother's Sisters

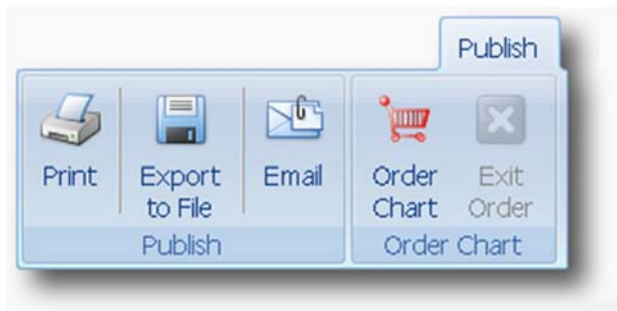
Nath
b: 17
Wood
Conn

The Publish Tab of the Ribbon

Publish Tab

The **Publish** tab is part of the main Ribbon of Legacy Charting. (See [The Ribbon](#) for more information on how to use this main toolbar.)

The ultimate goal of creating a large chart is to print it and hang it up for all to see and enjoy. Charts can range from a single letter-sized page to a hundred square feet or more. Simple charts with only a few generations can often be sized and positioned so as to only take one small sheet of paper and be easily printed on your personal printer. Large charts can oftentimes require dozens or even



hundreds of letter-sized pages to print. These are better reserved for output on a plotter where they can be printed on a single sheet of paper that can generally be up to 42 inches wide and twelve feet long. Plotters are often found at larger copy centers. Charting also has a built-in and affordable chart printing service.

Your chart can be printed on your personal printer at any time. Depending upon the size of your chart, it might span many pages that you would have to cut and tape together. The total number of pages that your chart will print upon is shown in the **Status** bar along the bottom of the window. Sometimes it is more efficient, taking fewer pages, to orient your paper to landscape rather than portrait mode before printing. (To make this change, go to the **File** button and choose **Printer Setup**.)

Printing Your Chart On Your Own Printer

To print your chart, click **Print** on the **Publish** tab (or on the **Quick Access Toolbar**). From the **Print** dialog box, make sure the correct printer is selected. If you only want to print a range of pages, set the **from** and **to** values accordingly. (The pages of the chart, as shown by the dashed red lines, are numbered left to right, and top to bottom.) When you are ready to print, click **OK**.



Exporting to a File

You can export your chart to a graphic file in several different formats. These include PDF, Bitmap, Jpeg, PNG, Tiff, and PSD. PDF files are a great way to send charts to people by way of email. The other formats are useful when including charts in books and other publications.

To export your chart, click the **Export to File** button on the **Publish** tab. Choose the desired format, select the export folder and file name, and then click **OK**.



Email

When you have produced a nice chart and you want to share it with another family member or friend, it is convenient to be able to email it to him or her. You can attach a PDF version of the chart or convert the chart to one of the other available file formats and send that.

To send a chart by email, click the **Email** button on the **Publish** tab. Choose the file format (PDF File is usually the best)



Printing a Chart at Your Local Printer

You can create a PDF file of your chart (**Publish** > **Export to File** > **PDF**) that you can take to your local printer to be printed as a wall chart. Check with your printer to see what paper sizes and paper qualify are available.

Ordering a Printed Wall Chart

There are two modes for laying out charts in the program. The first one is used for charts that you will be printing on your own printer. The second is for layout charts that will be printed on a plotter. Charting has a built-in professional chart printing service that make it very easy to visualize what your wall chart will look like when it is printed and how much it will cost to order it from us.

To start the professional layout process, click **Order Chart** on the **Publish** tab. When you do, the *Order Option* panel is displayed along the right side of the Charting window. You will also notice that the chart area changes to the paper size currently shown in the Order Option panel. Plotter paper only comes in three widths, 24", 36", and 42" wide. You can print your chart on one of these paper widths. The length of the chart can be up to 12 feet long. If your chart is wider than 42", you can have it printed in two or more strips.



Order Options

Paper Type:
Presentation

Paper Size:
24 inches

Orientation:

A

A


Sheets: 1
Width: 24.00"
Height: 1 feet
Quantity: 1
Cost: \$6.00 US
Shipping: ?

Purchase Chart


Exit Order

Help

Orientation of the Paper

Portrait – When you have portrait mode selected,  the paper roll on the screen goes from the top down. As you increase the height of your chart, the roll will extend in one-foot increments. If your chart extends off to the right of the current paper roll, another strip is added. If you have selected 24" paper, another 24" strip is added. If your chart only needs 36" or 42" in width, you should change to that width of paper, thus using only one strip instead of two or more.

Landscape – When you have landscape mode selected,

 the paper goes from left to right. As you increase the width of your chart, the roll will extend in one-foot increments. If your chart extends off the bottom of the current paper roll, another strip is added. Again, if you have selected 24" paper, another 24" strip is added. If your chart only needs 36" or 42" in height, you should change to the appropriate width of paper so that you minimize the use of additional strips.

The charting service offers four different types of paper upon which you can have your chart printed. These include:

20lb Bond Paper – Bond paper is about as heavy as typing paper. It is not archival but is perfect for research charts that are going to be written on and added to. It is not heavy

enough for good picture quality however. Cost: \$15 plus \$1, \$2 or \$3 per linear foot (for 24", 36", and 42" respectively).

24lb Presentation Paper – This is a quality presentation paper that is about as heavy as typing paper. It is archival, bright white, UV coated, and is perfect for charts with decorative elements. Cost: \$15 plus \$2, \$3 or \$4 per linear foot.

Glossy Photo Paper – This is an archival 80lb heavy glossy photo paper. The gloss makes photos appear crisp and clear. Cost: \$15 plus \$6, \$9 or \$12 per linear foot.

Artist Grade Matte Canvas – This is a heavy matte archival artist's canvas. The canvas giclée printing process is the same archival quality as a fine art reproduction from an art gallery. It is a rich, beautiful medium for a classic looking genealogy chart. The light texture helps lower-quality antique pictures look cleaner. Cost: \$15 plus \$20, \$28 or \$35 per linear foot.

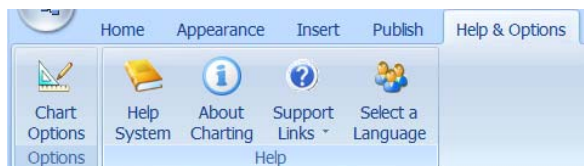
Pricing

As you select the paper size and type, the printing cost for your chart is displayed.

Purchasing a Chart

When you are ready to place an order for a printed chart, click the **Purchase Chart** button. Charting takes you through a 3-step review of your order to double-check the size, orientation, paper type, quantity, cost, and shipping information. Finally, you indicate your desire to place the order by clicking the **Order Chart** button on Step 3 and then you are taken through the payment and shipping steps, and find out what the shipping cost will be to your location from our Utah-based printer. (Other printers at other location may be added in the future.) Sales tax is also added for Arizona, Utah, and Washington State orders. At the end of this process you then do a final confirm of the order, upload your chart file and then sit back and wait for your beautiful charts to arrive at your doorstep. (You should allow up to two weeks for chart delivery. Rush delivery is available for an extra charge, cutting the normal delivery time in half.)

The Help & Options Tab of the Ribbon

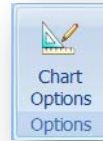


The **Help and Options** tab is part of the main Ribbon of *Legacy Charting*. (See [The Ribbon](#) for more information on how to use this main toolbar.)

Options

General

Clicking on the **Chart Options** button displays the *Chart Options* window.



View Tab

Appearance

Show page boundaries – Shows the page boundaries with dashed red lines. This is determined by the current printer and page size selected in the Printer Setup.

Use short locations – Uses the short version of the location names. (Note: You must reapply the current theme when you change this option.)

Default Privacy Options when a chart is created

Suppress private individuals – If, by default, you don't want to include the private individuals from your charts, select this option.

Suppress private information – If, by default, you want to suppress information that is marked as [[private]], select this option.

Suppress details for living people – If, by default, you want to not include the detail information for individuals that are still alive, select this option.

Use "Living" instead of their name – If you would like to set as a default to use the word "Living" instead of displaying a living person's name, select this option.

Default Box Item Settings

Font – Select the default font for the text items in a box.

Size – Select the default font size for text items in a box.

Measurements

Choose between inch or metric measurements to be shown in the program.

User Information Tab

Enter your name and contact information here. You can include this information in the chart Legend if desired.

Folder Locations Tab

Chart File Folder – Specify the default folder in which to store your chart file.

Genealogy File Folder – Specify the default folder to display when you are browsing for a genealogy family file to load for charting.

Image Folder – Specify the default folder to display when you are selecting an image to display on the chart.

Export Folder – Specify the default folder to display when you are choosing where to export a chart file.

Date Options Tab

Date Format

Select from six date display formats:

mmm dd, yyyy	Nov 30, 1854
dd mmm yyyy	30 Nov 1854
mm-dd-yyyy	11-30-1854
dd-mm-yyyy	30-11-1854
yyyy mmm dd	1854 Nov 30
yyyy-mm-dd	1854-11-30

Separators for numeric dates

If you are using either the dd-mm-yyyy or mm-dd-yyyy format, you can specify the separator character to place between the date parts. Click the option button for the appropriate symbol.

If you are using a date format that doesn't include separator characters, such as 21 Apr 1900, then Charting uses the selected date separator character between any year ranges. For example, 21 Apr 1953-1958 would appear as 21 Apr 1953/1958 if the slash was chosen as the separator character.

Month Format

You can further alter the way dates are formatted by selecting abbreviated or full month names and initial or all uppercase month names. Click the option buttons corresponding to the desired format.

Character format

You can display the months with Initial Caps, all uppercase, or all lowercase.

Help System

Online Help

To open the help system for Legacy Charting, click the **Help System** option. From the help system you can search by topic or use the **Contents** tab to answer your questions.



If you want context-sensitive help (help on what you are currently doing), press the **F1** function key on your keyboard.

About Charting

Legacy Charting is developed and distributed by Millennia Corporation, Surprise, Arizona. Copyright 2017, Millennia Corporation. All rights reserved.

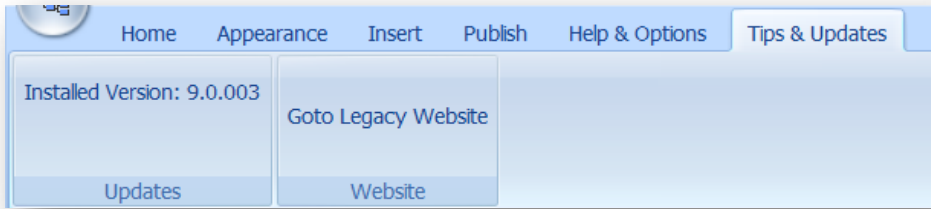


Support Links

Get information concerning customer support, reporting a bug, suggesting new features, or going to the Charting web site, you will find it here.



The Tips & Updates Tab of the Ribbon



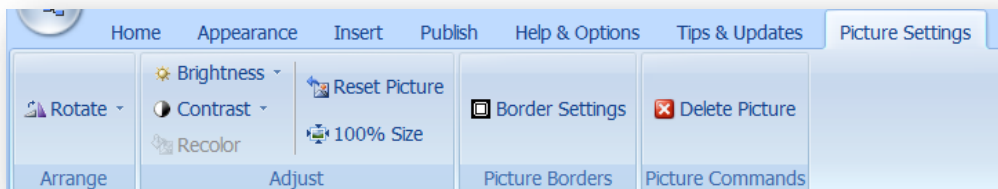
Updates

The current version number of Legacy Charting that you have installed is displayed on this tab. If you do not have the latest charting update, then you should update your Legacy program.

Messages

If you have Internet access, the *Message Center* is the place to go to get the latest tips and tricks concerning your charting experience. Check here often for helpful articles and announcements.

The Picture Settings Tab of the Ribbon

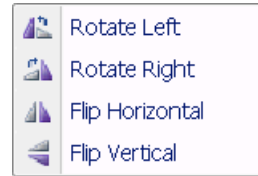


Picture Settings Tab

The **Picture Settings** tab is part of the main Ribbon of Legacy Charting. It only appears when you have a picture selected within your chart. (See [The Ribbon](#) for more information on how to use this main toolbar.)

Rotating

You can rotate a picture right or left in 90 degree increments. This may be necessary if a picture was taken by rotating the camera to fit a person or scene better. You can also flip a picture top-to-bottom or left-to-right. Flipping a picture top-to-bottom is not the same as flipping the picture 180 degrees. When flipping top-to-bottom or left-to-right, the picture is actually reversed. If there is any writing on the picture or anything that would look “wrong,” like a clock, or two people shaking right hands, the viewer will notice... so be careful.



Bring to Front & Send to Back

By default, text boxes are cover pictures. This means that if you drag a text box over a picture, the picture will appear behind the text box. To change this, click on the picture and choose **Bring to Front** in the **Arrange** section of the **Picture Settings** tab. (Or you can click on the text box and then click **Send to Back** in the **Text Appearance** section of the **Text Settings** tab.)

Pictures and text boxes cannot be brought in front of individual chart boxes. The chart boxes are always on the top layer.

Image Adjustments

Brightness – You can adjust the image brightness from -40% (darker) to +40% (lighter) to make your pictures look better.

Contrast – You can change the contrast from -40% (blurrier) to +40% (sharper).

Re-color – Charting supports the displaying and printing of both color and black and white pictures. Color pictures can be converted to gray scale (black and white) by clicking **To Gray Scale**. This is often necessary if you are printing charts on a non-color printer or plotter. Color pictures sent to a black and white printer often come out looking muddy and washed out.

Reset Picture – To revert back to the original picture, abandoning any changes you have made to it, click **Reset Picture**. (When Charting places a picture on your chart, a copy is made of the original. As you make changes to the chart picture, you are working with the copy, not the original.)

100% Size – If you have stretched a picture smaller or larger, you can revert back to its original full size.

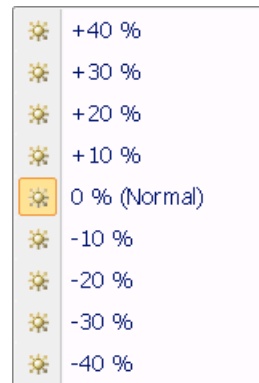


Image Settings

Aspect Ratio

The aspect ratio of a picture is the original width to height ratio. If you stretch a picture wider or taller, the aspect ratio changes and the picture can look strange (although a small amount of tweaking can make a person look better in many cases...).

To restore a picture that has been stretched, to its original proportions, click **Reset Picture**.

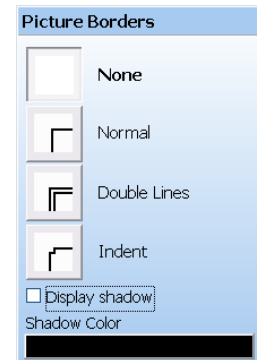
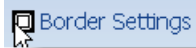


To restore a picture to its full size, click **100% size**.



Picture Borders

To place a border around your picture, click **Border Settings** and then select the border style you would like. You can also have a drop shadow placed behind the picture.



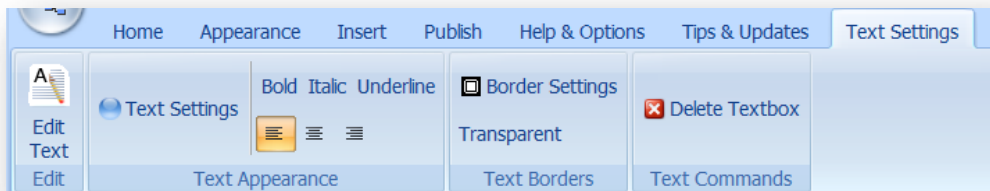
Deleting a Picture

To delete the current picture from the chart, click



Note, the picture file its self is not actually deleted from your computer, it is just removed from the chart.

The Text Settings Tab of the Ribbon

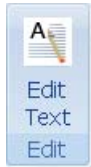


Text Settings Tab

The **Text Settings** tab is part of the main Ribbon of Legacy Charting. It only appears when you have a text box selected on your chart. (See [The Ribbon](#) for more information on how to use this main toolbar.)

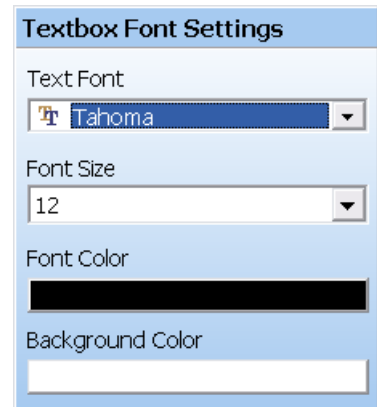
Edit

To add or edit the text in the text box, click **Edit Text**. When you have made the desired changes, click **OK**.



Text Settings

The font used for the text is selected from the **Text Font** option and the text size from the **Font Size** option. To change the color of the text, make the change from the **Font Color** option. You can change the background fill color of the text box by selecting a color from the **Background Color** option.



Styles & Alignment

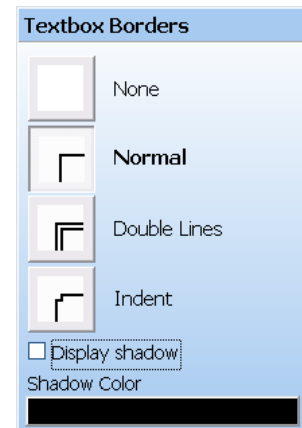
The text within a text box can be bolded, italicized, and underlined by clicking on the desired style. The text alignment can also be set to left-, right-, or center-justified.



Border Settings

Displaying a Frame

To display a lined frame around a text box, click on the **Border Settings** option. Choose the desired border style. You can also choose to have a drop shadow displayed behind the text box.

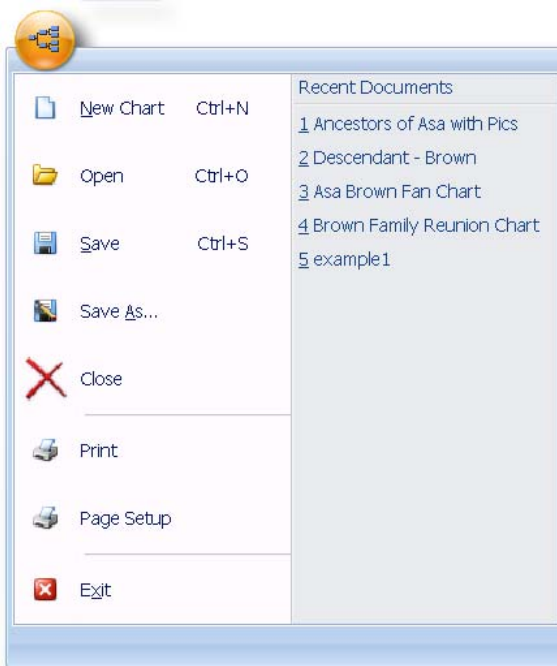


The File Button



The File Button










The nice looking round button in the upper-left corner of the main screen is called the **File Button**. It lets you start a new chart, open an existing chart, save a chart, and change the name of a chart. You can also print your chart on your local printer from here, as well as change the settings on your printer. And last, but not least, you can close Legacy Charting.

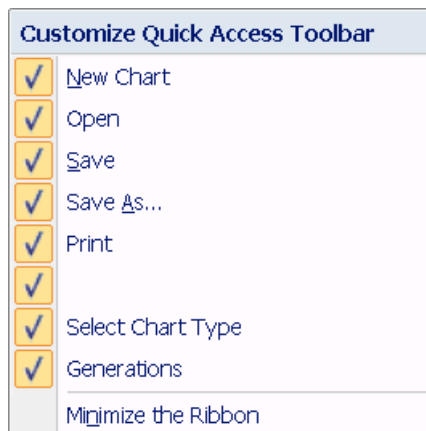


The Quick Access Toolbar



The Quick Access Toolbar

The small toolbar along the top side in the upper-left corner is called the Quick Access Toolbar. It is always visible and gives you some commonly needed options. These include starting a new chart , opening an existing chart , saving a chart , saving a chart under a new name , printing a chart , selecting a new starting individual , selecting a new chart type , and changing the number of generations for a chart . Just to the right of the toolbar is a button that lets you customize it .



The Side Toolbar



The Side Toolbar

The **Side Toolbar** consists of tools that affect the layout and viewing of your chart. You can use these tools to move your chart around the page (or pages), move individual boxes, generations of boxes, or specific ancestor or descendant lines of boxes.



The Selection Arrow - Used to select one or more boxes and then move them around on the chart. When you select a box, the box's background turns black.



To move a selected box, drag it with the mouse cursor. The number of boxes that actually move when you drag a selected box depends on the setting of the **Drag** button lower in the toolbar. You can select more than one box by holding down the **Shift** key while you click on additional boxes. You can also select multiple boxes by drawing a box that touches or encloses the desired boxes. (With your mouse, point to a place on the background that is above and to the left of the upper-left box you want to select and then press down and hold the left mouse button while you then drag a rectangular box around the boxes you want to select on the chart. When you release the mouse button, all the boxes enclosed or touched by the rectangle are selected.)

When you move any of the selected boxes, all the other selected boxes move with it (along with the other line or generation boxes specified by the current **Drag** button). If you drag a box off the right or bottom edge of your chart area, additional pages are automatically added to accommodate them. Likewise, if you drag all the boxes off of a page along the right or bottom side, the unused pages are removed for you.



The Drag Hand – When the chart is zoomed in to be larger than the main chart window, you can drag it around using the **Drag Hand** in order to view other parts of the chart. Just hold the left mouse button down while you drag the chart in any direction.



Zooming In and Out – You can zoom your chart in and out, from 3 percent to 200 percent - to get the big picture or to see fine detail. (You can also zoom in and out using the center wheel on your mouse, if you have one.)



Center Chart – Re-centers the chart within the least number of pages needed to hold it. Only the chart boxes and lines are repositioned. All pictures or text boxes that you have added are left alone.



Zoom to Chart – Sets the zoom level so that the chart fills the main chart window, if possible. (If the chart is very large, the zoom level is set to a minimum of 3 percent. You will then have to use the **Drag Hand** or the **Navigator Square** to move around the chart.)



The Drag Buttons – These determine which boxes are moved when you drag a selected box.



Drag only one Individual – Only the selected box (or boxes, if more than one has been highlighted) moves when dragged with the mouse.



Drag Lines of Individuals – The selected box and all connected ancestor boxes (for an ancestor chart), or descendant boxes (for a descendant chart) move when dragged with the mouse.



Drag all Individuals of the same Generation – All the boxes in the same generation as the selected box are moved.



Drag All Individuals – All the boxes on the chart are moved when the selected box is moved. This includes any text or picture boxes on the chart.

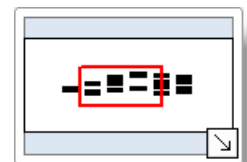


The **Reformat Chart** button – Resets the current chart to the default layout (after asking for permission to do so). If you have moved boxes around on an ancestor or descendant style chart, the boxes will be moved back to their default locations. So, if you have spent a long time rearranging your chart boxes, don't use this feature unless you want to start all over again.

Note: The **Reformat Chart** button doesn't have any effect on Fan charts.

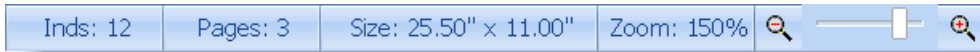
The Navigator Square

The **Navigator Square**, in the lower-right corner of the main chart window, gives you an overall view of your chart, no matter how big it is. If your chart is one page or 4000 pages, the entire chart is always shown. The red rectangle shows the current portion of the chart that is being shown on the screen. As you move around your chart, the red rectangle always shows where you



are. This is especially nice when you have a very large chart. You can also drag the red rectangle in the Navigator Square to a new position on the small chart to change the portion showing on the main screen. This is often the best way to quickly zoom into a specific portion of a large chart. The Arrow in the lower-right ↘ minimizes the navigation square. To restore the Navigation Square, click the arrow again ↖.

The Status Bar



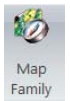
The Status Bar, along the bottom of the main chart window, displays how many individuals are included on the chart, how many pages the chart would require to be printed on your local printer, the resulting overall size of the chart, and what the current zoom level is.

Chapter 9

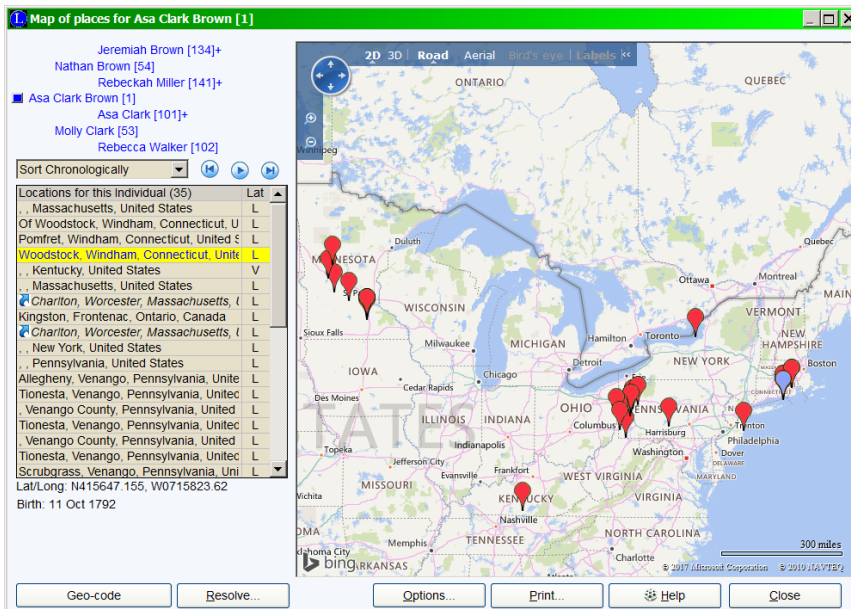
Map My Family

Where did they live and where did they travel?


The *Map My Family* window plots all the locations associated with a person allowing you to see where he spent his life. (Deluxe Edition only) This often shows a path or migration pattern for the individual and may offer additional clues as to where other events happened during his life. Along with the locations belonging to the individual, you can also include the locations associated with the birth and death of the spouse, children, and parents. Marriage locations can also be included.

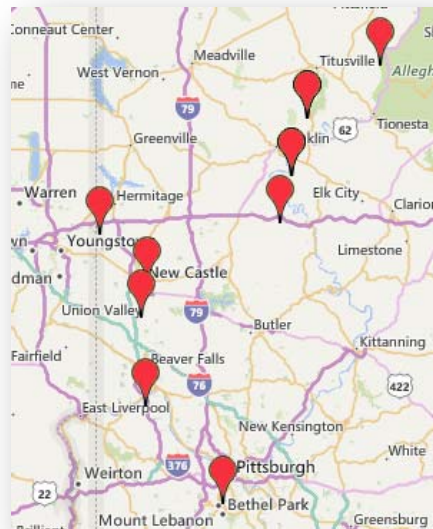


To display the map, choose **Map Family** from the **View** tab of the **Ribbon** bar, or click the button if you have placed it on the toolbar. When the map is initially displayed, it is broad enough to encompass all the locations that have been selected to include.



As you place the mouse pointer over each pin, a text balloon appears showing the name of the location and a list of the events that happened there.

Initially, the pushpins might be stacked one atop another making them difficult to tell apart. To move the pins apart, use the **Zoom In**  button. As you enlarge the map area, the pushpins move apart and are easily differentiated.





Working With the Map

In the upper-left corner of the map is the *View Control*. The *View Control* lets you zoom in  and out , pan the map up and down and



sideways , switch from **Road** (drawn map) to **Aerial** (satellite view) to **Hybrid** (a combination of **Road** and **Aerial**) and **Bird's eye** (an angled airplane view).

You can hide the *View Control* by clicking the  button at the upper-right corner. To display the *View Control* again, click .

If you double-click anywhere on the map, the point where you clicked will move to the center of the map and the map will zoom in one setting. You can also drag the map in any direction with the mouse.

Pedigree Navigator

A small, three-generation pedigree is shown in the upper-left corner of the window. The current individual is at the starting position in generation one. This is a live chart that you can use to move up to ancestors and down to descendant. To move to a parent, or a grandparent, simply click on their name. This moves that person into the starting position of the chart and redraws the map using location connected to him or her. To move down to a descendant (or to move to a spouse), click the small blue button to the left of the main person. This displays a popup list of the spouses and children where you can select the desired person to become the focus of the map.

List of Locations

All the locations that are associated with the current person are displayed in the Location List. Each place name is only shown once, even if more than one event happened at that place. The **Lat** column at the right side of the Location List shows an **L** for each location that has been geo-coded and therefore has a latitude and longitude recorded for it. When the Location List is first filled with all the locations for a person, Legacy runs down the list to try to geo-code any places that have not been done. (This requires that you have an active Internet connection.) Any locations that can't be automatically geo-coded are shown with a **?** in the **Lat** column. If you want to manually try to resolve these locations using the tools from the *Master Location List*, you can highlight the location and click the **Resolve** button under the list.

Options

Click the **Options** button under the map to access the following features:

Items to Include on the Map

Select the event locations you would like to include on the map. These include locations for the main person's birth, christening, death, burial, and events. You can also choose marriage and marriage event locations along with the birth and death locations of any spouses. Birth and Death locations for parents and children can also be included.

Zooming the List

You can choose the font size used in the Location List.

Printing the Map


If you would like to print the map, click the **Print** button under the map. If you would like to print the map in landscape mode, click **Preferences** from the *Print* dialog box and change the **Orientation** to **Landscape** and then click **OK**. Click **Print** to send the map to your printer.


How to Make a Graphic File from the Map

To capture the map on the screen and create a graphic file that can be attached to many events in Legacy, see **How to Make a Graphic File from the Map** on page 117.

Research Guidance

Where to Look for More Information

Legacy's **Research Guidance** icon  on the personal toolbar of the **Husband** or **Wife** on the *Family View* on the main screen of Legacy is your starting point for getting help finding more information about your ancestors. This fantastic resource points you to specific suggested sources from the tens of thousands contained in the research guidance system. And more are being added all the time.

To start the *Research Guidance* process for someone, make sure that person is in one of the two main positions on the *Family View* and then click on the **Research Guidance** icon  on their personal toolbar. The system then accesses the extensive source database and calculates and displays the number of **Preliminary Survey** sources and **Suggested Sources** for further research. The *Research Guidance Results* screen is then shown. You can also access Research Guidance tool for anyone showing on any of the main Legacy views by right-clicking on the person's name and then choosing **Research Guidance** from the popup menu.

Research Guidance Results

Legacy's *Research Guidance* helps you locate records that may contain information about your ancestors. It does this in four steps.

- 1 Legacy helps you review the ancestor's timeline, to be certain that you've already recorded everything you know about the ancestor.
- 2 Legacy suggests preliminary survey sources to help you learn if the research is already in progress by another researcher.
- 3 Select your goal, and Legacy provides a list of prioritized suggestions to help you accomplish your goal.
- 4 Finally, Legacy organizes the sources into a To-Do List.

The *Research Guidance Results* screen shows the current person at the top of the window along with his or her birth and death information. If any piece of information has been estimated by Legacy, it is surrounded by angle brackets, and highlighted in red.

Options

Clicking the **Options** button near the upper-right corner of the screen lets you print the current person's research suggestions, or change the font sizes of various portions of the screen so that you can see them better or display more information.

Below the personal information are four tabs corresponding to the four general areas of Research Guidance. Each is described below:

1 Review Timeline Tab

Research Guidance Results for Asa Clark Brown [1]

Asa Clark Brown [1]
 b. 11 Oct 1792. Woodstock, Windham, Connecticut, United States
 d. 8 Mar 1866. Minneapolis, Hennepin, Minnesota, United States

1 **Review Timeline** 2 Preliminary Survey (104) 3 Suggested Sources (305) 4 To-Do List (5)

Purpose

The timeline helps Legacy find the best sources to achieve your goals.

What should be included in the timeline?

Answer: anything that can identify Asa Clark Brown [1] in a location on a specific date. Suggested timeline events include: census, deeds, directories, military, travel, etc.

30 Timeline Events

Use	Name	Date	Place
<input checked="" type="checkbox"/>	Disproven Birth		, , Massachusetts, United States
<input checked="" type="checkbox"/>	Birth	11 Oct 1792	Woodstock, Windham, Connecticut, United States
<input checked="" type="checkbox"/>	Disproven Birth	Abt 1794	, , Kentucky, United States
<input checked="" type="checkbox"/>	<i>Census</i>	1800	Charlton, Worcester, Massachusetts, United States
<input checked="" type="checkbox"/>	<i>Census</i>	1810	Charlton, Worcester, Massachusetts, United States
<input checked="" type="checkbox"/>	Marriage	1810-1815	
<input checked="" type="checkbox"/>	Military	15 Sep 1813-9	, , New York, United States
<input checked="" type="checkbox"/>	Child	Abt 1815	
<input checked="" type="checkbox"/>	Child	Abt 1817	, , Pennsylvania, United States
<input checked="" type="checkbox"/>	Child	Abt 1819	
<input checked="" type="checkbox"/>	Census	1820	Allegheny, Venango, Pennsylvania, United States
<input checked="" type="checkbox"/>	Child	9 Jul 1822	Tionesta, Venango, Pennsylvania, United States
<input checked="" type="checkbox"/>	Deed	2 Sep 1826	Venango County, Pennsylvania, United States
<input checked="" type="checkbox"/>	Marriage	8 Mar 1832	Tionesta, Venango, Pennsylvania, United States
<input checked="" type="checkbox"/>	Deed	6 Aug 1832	, Venango County, Pennsylvania, United States

Event details: Unselect All

[Click here for an example of a completed timeline](#)

Add Event/Fact Edit Event/Fact

On the right is a list of the timeline events that make up the person's profile. This is the information used to display suggested sources that you should look at to find additional information for the individual. Some of these events are drawn from existing information and others are estimated by Legacy and shown in red with angle brackets around them. In general, the more timeline events that are known, the better Research Guidance can suggest helpful sources to research.

What Information to Use

By default, all the timeline events in the list are used to generate research suggestions by Legacy. If you would like to turn off the inclusion of any particular event, click the checkbox in the **Use** column on the left to remove the checkmark. Subsequent clicking of the checkbox toggles the checkmark on and off.

2 Preliminary Survey Tab

Before starting original research on an ancestor, you should learn if that ancestor has already been researched and documented by another fellow genealogist. In Step 2 of Legacy's Research Guidance, Legacy suggests various sources and Internet sites where you can see if anything has already been published concerning your ancestor.

1. Research Guidance Results for Asa Clark Brown [1]

Asa Clark Brown [1]

b. 11 Oct 1792. Woodstock, Windham, Connecticut, United States

d. 8 Mar 1866. Minneapolis, Hennepin, Minnesota, United States

1 Review Timeline 2 **Preliminary Survey (104)** 3 Suggested Sources (305) 4 To-Do List (5)

Lineage - Linked Databases (14) Surname MB / ML (3) Locality MB / ML (3) **Genealogies (9)** Local Histories (75)

9 Suggested Sources

Source Name	Online	Ignore	To-Do	Done
American Genealogical-Biographical Ind	✓			<input type="checkbox"/>
English Origins of New England Families	✓			<input type="checkbox"/>
Family History Books	✓			<input type="checkbox"/>
Genealogical Dictionary of the First Sett	✓			<input type="checkbox"/>
Genealogies of the Family History Librar	✓			<input type="checkbox"/>
Genealogies of the Library of Congress	✓			<input type="checkbox"/>
The Compendium of American Genealog	✓			<input type="checkbox"/>
USGenWeb Project	✓			<input type="checkbox"/>

Plan to search Online Options

Source Output:

Fremont Rider, editor, *The American Genealogical-Biographical Index to American Genealogical, Biographical and Local History Materials* (Middletown, Conn. The Godfrey Memorial Library 1952-;

The Source can be found at the following Repositories:

Name	E-mail	Online
Ancestry.com		
FamilySearch		
Godfrey Memorial Library		
MyHeritage		

E-mail Website Repository Info

Source Tip

American Genealogical-Biographical Index (AGBI):
Millions of records of individuals are indexed in these volumes. Indexed records include family and local histories, the Boston Transcript, the 1790 U.S. census, and published Revolutionary War records.

Source Category Description:(Preliminary: Genealogies)
When conducting a preliminary survey at the outset of researching a surname line, the compiled published family histories put together by other genealogists are searched. These histories are usually found in large genealogy collections such as the Library of Congress, the Family History Library (FHL) as indicated in the FHL Catalog, the New York Public Library and similar public libraries, or large genealogical society collections such as the New English Historic and Genealogical Library (NEHGS) or the DAR Library, or as found in microform collections in other repositories.

The Preliminary Survey tab contains five sub-tabs:

Lineage-Linked Databases

Surname MB / ML (Message Boards and Mailing Lists)

Locality MB /ML

Genealogies

Local Histories

Each tab indicates in its caption how many suggested sources are included. The five tab areas are described below:

Lineage-Linked Databases

A Lineage-Linked database is what is created as you enter information into your Legacy Family File. Many researchers choose to publish their lineage-linked databases to the Internet. The sites listed here are major repositories for these electronic databases. Some can be searched freely, others require a nominal subscription fee.

The top portion of the tab area contains a list of the online databases containing lineage-linked pedigrees where you may find the current person. The bottom of the area is a web browser. (To use the web browser, you must be connected to the Internet and have Internet Explorer installed on your computer.)

To search any of the lineage-linked preliminary survey databases, highlight the desired source in the upper list and then click the **Search** button below the list. The search page for the appropriate web site is loaded and displayed in the web browser.

Surname MB / ML (Message Boards and Mailing Lists)

Message Boards and Mailing Lists assist researchers in communication with each other. These should be searched before beginning original research to learn if others have already researched your same family lines. These Message Boards and Mailing Lists are also places where you can submit queries about your research.

Like the Lineage-linked tab, the top portion of this tab area contains a list of the online message boards and mailing lists that match the current person. For females, message boards are suggested that include each of their married names and their maiden name. The bottom of the area is a web browser.

To search any of the resources, highlight the desired message board or mailing list and then click the **Search** button. The search page for the appropriate web site is loaded and displayed in the web browser.

Locality MB /ML

Like the Surname Message Boards and Mailing Lists, locality Message Boards and Mailing Lists are places where you can submit queries or search the archived queries relating to a certain locality.

This tab shows any locality message boards or mailing lists that might be useful in researching your ancestors. It works the same way as the Surname MB/ML tab.

Genealogies

Millions of books have been published over time. It is possible that one of those books contains genealogical information about your ancestor. The sources listed here assist you in locating a genealogy about your ancestor. Indexes and even some of the actual genealogies can be searched online.

If there is a suggested source in the list that you would like to search, you can either click on the **Plan to Search** button, to add that source to the To-Do List, or, if the source is marked as *online*, click on the **Online** button to search the source online. If you want to ignore the suggested source, click on the **Ignore** button.

Below the suggested sources is a list of repositories. These are places where the suggested source can be researched.

The **Reason** section of the screen displays the reasons for which the source was suggested.

The **Source Tip** section may include additional helpful information about the suggested source.

Local Histories

Learning about the history of the cities, towns, counties, and other regions helps you learn about your ancestors. The suggested sources in the **Local Histories** tab are sources that help you learn about this history. Many of these histories contain biographical information about the people who lived in the area. They may also provide information about where the people came from who settled the area. Finding your ancestor's name in print may not only help you solve your research problem, but it helps them *come alive!*

3 Suggested Sources Tab

Once steps 1 and 2 have been completed, the **Suggested Sources** tab, step 3, provides you with the best sources to learn about your ancestor.

Research Guidance Results for Asa Clark Brown [1]

Asa Clark Brown [1]
 b. 11 Oct 1792. Woodstock. Windham. Connecticut. United States
 d. 8 Mar 1866. Minneapolis. Hennepin. Minnesota. United States

1 Review Timeline | 2 Preliminary Survey (104) | 3 **Suggested Sources (305)** | 4 To-Do List (5)

Goal: Birth | Goal: Death | Goal: Marriage | Goal: Parents | Goal: Siblings | Goal: History

275 Suggested Sources

Rank	Source Name	Online	Ignore	To-Do	Done
1	1850 United States Federal	✓			<input type="checkbox"/>
1	1860 United States Federal	✓			<input type="checkbox"/>
1	America's Successful Men	✓			<input type="checkbox"/>
1	Barbour Collection: Connecticut	✓			<input type="checkbox"/>
1	Biographies				<input type="checkbox"/>
1	Biographies of Notable	✓			<input type="checkbox"/>
1	Biographies, group				<input type="checkbox"/>
1	Church records				<input type="checkbox"/>

Plan to search | Online | Options

Source Output:
 Lucius Barnes Barbour, *Barbour Collection: Connecticut Vital Records Prior to 1850* (Salt Lake City: Filmed by the Genealogical Society of Utah, 1949).
 The Source can be found at the following Repositories:

Name	E-mail	Online
Ancestry.com		
Connecticut State Library		
Family History Library		
FindMyPast.com		

E-mail | Website | Repository Info

Source Tip
 Barbour Collection: Connecticut Vital Records Prior to 1850 - Birth Records: Barbour Collection: Connecticut Vital Records Prior to 1850 is a compilation of birth records in this area. See the [Connecticut State Library's web site](#) for a description of these records.
Source Category Description: (Vital Records: Birth)
 Documents which contain information regarding the birth of an individual. Usually these are maintained by a government entity such as a Civil Registration of births. But they might also include hospital, midwife, or newspaper records of birth.

The **Suggested Sources** tab contains seven sub-tabs corresponding to the seven possible goals available in the Research Guidance system. These are:

- Birth
- Death
- Marriage
- Parents
- Siblings
- History
- Maiden Name

Each tab area has the same layout as described below:

Suggested Sources

In the upper-left part of the tab area is the list of suggested sources for the current goal. This list is ranked in order of importance, which means that the researcher is more likely to find information relating to their goal in the sources that are ranked higher (1 is the highest). However, do not neglect the sources that are ranked closer to the bottom of the list, because one never knows all of the hidden information in various sources. If you would like to see more detail for a particular source, double-clicking it displays all the information.

The *Suggested Sources* list also indicates if the source is available online

Source Output

Below the **Suggested Sources** list is a source citation for the highlighted source in the list. This can be used later, if you find information from this source, as the source documentation in Legacy.

Source Repositories

The repository list shows one or more places where the source (highlighted in the Suggested Sources list) can be found. Each repository line also indicates if there is an e-mail link or a web site address available by showing icons in the **Email** and **Online** columns. To view complete address and contact information for any repository, click the **Repository Details** button below the list. (You can also double-click any repository for the details. To send an email to a repository (with an Email icon), click the **Email** button below the list. To launch your web browser and display the web site for the repository, click **Online**.

Source Tip

As you highlight each source in the Suggested Sources window on the left, the reason for suggesting that source is displayed in the window to the right. For example, if the *Barbour Collection: Connecticut Birth Records...* source is suggested, the reason section explains that this source was suggested because the individual lived in Connecticut during the same time period that the source covers.

Along with the reason is more information about the source. In some cases, it lists the information that you might find in the source. It may suggest to you how to best utilize and/or analyze the information you might find.

How to Use the Suggested Sources

If you would like to search the source, click on the **Plan to Search** button to add it to your **To-Do List**. This is an important step – adding the source to your To-Do List helps you keep a log, or a history, of the sources that you have searched.

Some of the sources listed in the list can be searched online. If this is true, an Internet icon appears in the **Online** column. Just click the **Online** button, and select the site that you wish to search.

If there is a source listed that you want to ignore, you can click on the **Ignore** button. This pops up a menu where you can selected to:

- **Hide/Show ignored sources**
- **Ignore the highlighted source for the current individual.**
- **Ignore the highlighted source for everyone**

4 To-Do List Tab

The final step in Research Guidance is to utilize the To-Do list that you have generated.

1. Research Guidance Results for Asa Clark Brown [1]

Asa Clark Brown [1]

b. 11 Oct 1792. Woodstock. Windham. Connecticut. United States

d. 8 Mar 1866. Minneapolis. Hennepin. Minnesota. United States

Edit Options Help Close

1 Review Timeline 2 Preliminary Survey (104) 3 Suggested Sources (305) 4 To-Do List (5)

Both Open/Closed Only Open Only Closed

Sta	To-Do Item	Date	Typ	Pri
<input type="radio"/>	Search Hennepin Co., MN deed indexes	26 Sep 2000	R	L
<input type="radio"/>	Request War of 1812 Veteran Claim	6 Dec 2001	C	L
<input type="radio"/>	Search Charlton, MA marriage records	8 Dec 2001	R	L
<input type="radio"/>	Search for article about Asa's house's fire	6 Feb 2002	R	L
<input type="radio"/>	Search for bounty land warrant of 1852	6 Feb 2002	R	H

Add Edit Print To-Do...

Task: Search Hennepin Co., MN deed indexes

Category: Land

Locality: Hennepin County, Minnesota

Description: "Grantee deed indexes Jan 1848 - May 1872," FHL Film 1324604

Results:

File ID:

As you search the sources, even the online sources, be sure to update the To-Do Item by clicking on the **Edit** button. Here you can record your results.

For example, if you searched the *International Genealogical Index*, and you did not find anything for your ancestor, be sure to record this. Record all variations of the name/surname that was searched, the time periods you searched, and any pertinent information so that you, or a fellow researcher, can understand exactly what you searched.

Check Back Often

Legacy's Research Guidance system is updated often, so check back frequently for great new sources to search.

As you add new information to your Legacy Family File, the list of suggested sources may change. New sources may appear as you find more exact information.

Chapter 11

Other Features

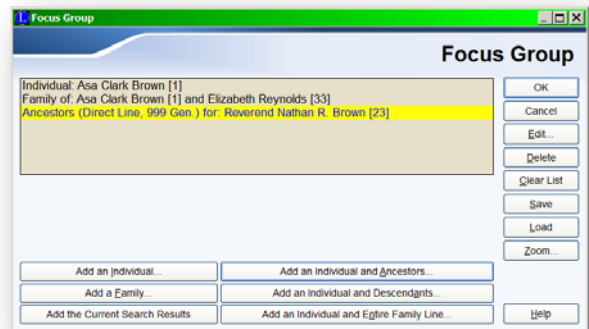
Where to Get Help

There are a multitude of features in Legacy that are covered in great detail in the help system built into the program itself. Below, and on subsequent pages, is an alphabetized list of features and options with a summary of each one along with where to look in the Legacy Help file for more information.

Focus Groups

A *Focus Group* is a subset of records and includes selected individuals, families, ancestors and/or descendants. The contents of a *Focus Group* determine who will be exported to a file or printed on a report.

A *Focus Group* can contain as few as one individual, or as many as the entire contents of the family file. An individual and all his or her ancestors can be added to the group with a single selection.



For complete information about creating Focus Groups, see the Legacy Help system and search the index for: ***Focus groups***

Ancestor Coloring Options

Ancestor and Descendant type reports and many screens can now show colors associated with one of the four grandparents lines or one of the eight great-grandparents. There is also an option to color males and females differently on reports.



(Help index: ***Ancestor colors***)

Calculators

Bearing and Distance Calculator

You can now use latitude and longitude values for something useful. This new calculator tells you the distance in miles (or kilometers) between any two points on earth. It also tells you which direction to travel from one point to the other. You can also convert decimal bearing values to needed degrees, minutes, and seconds. It even ties into the *Master Location List* where you can select any two cities (with latitude and longitude values) and quickly figure out how far apart they are and in which direction.



(Help index: ***Bearing calculator***)

Date Calculator

The date calculator figures the time span between two dates, or calculates the beginning or ending date if you know one or the other along with an age.



(Help index: ***Date calculator***)

Relationship Calculator

You can quickly figure out all the different ways that any two people in your family file are related.



(Help index: ***Relationship calculator***)

Soundex Calculator

Soundex codes are used to group similar sounding last names together. These are often used when searching census records. Census takers often misspell names when writing them on the census forms. Searching for surnames using the Soundex code finds all similar sounding names.



(Help index: ***Soundex calculator***)

Customizing Legacy

Customizable *Family View* Information Fields

There are up to five lines on both the *Husband* and *Wife* boxes of the *Family View* that can display information. Each of these information lines can be changed to other

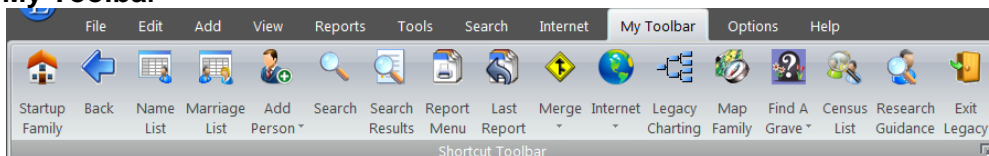
pieces of information you might want to view instead. To change the lines, click any of the descriptive labels to the left of the lines.




(Help index: **Customize - Family View information**)

Customizable Toolbars

My Toolbar



You can customize the **My Toolbar** tab of the **Ribbon** bar by clicking on the small icon  in the lower-right corner of the **Shortcut Toolbar** group.



(Help index: **Ribbon Bar: My Toolbar tab**)

You can now choose which toolbar buttons to include at the top of Legacy. Select from nearly 40 options that are only a click away. Place your most-used options right on the toolbar, for the full width of your screen in any order you want!



(Help index: **Customize - main toolbar**)

Family View and Pedigree View Toolbars The picture toolbars on the *Family View* and *Pedigree View* can be customized to show only the tools you want to use. You can also change their order.



(Help index: **Customize Family View toolbars** or **Customize Pedigree View toolbar**)

Customizable Options

The *Options* menu in Legacy is provided to allow the user to customize the program to personal preferences. The *Customize* screen is reached by choosing **Customize** from the **Options** tab of the **Ribbon** bar.

Following is a brief description of each tab and where to find complete information in the Legacy Help system.

General Settings

Set certain parameters so Legacy shows you the information you require most. For instance: How would you like the program to look when started? Should the main window be maximized? Which view would you like to see? Which family file should open? Who should be displayed? How would you like the surnames formatted? Do you want birth-death years added to names? How many columns of children should appear? What kind of pop-up help do you want to see?



(Help index: ***Customize - general settings***)

Data Entry

Control how you enter information. This includes verification of new names and locations, jumping directly to notes after entering information, letter case formatting of names and locations, the age at which people are presumed dead, default married name rules and the behavior of the Enter key.



(Help index: ***Customize – data entry***)

Data Format

Control how your information looks on the screen. This includes letter case formatting of names and locations, child list and living indicators, christening term, and potential problems indicator.



(Help index: ***Customize – data format***)

Data Defaults

Set how you want things to normally work while you are entering information. Options include living indicators, note types, cursor behavior, reuse of deleted records, default latitude and longitude directions, and units of measure.



(Help index: ***Customize – data entry/edit***)

Dates

Legacy supports many different formats for both inputting and displaying dates in the program. You can enter dates in almost any conceivable format and they are reformatted to a consistent format per your selection. You can also include several prefix modifiers including Before, After, About, Between, Circa, B.C., and A.D. Legacy also recognizes several abbreviations of these modifiers.



(Help index: **Customize - dates**)

File Locations

Set or change the default locations of your family files, multimedia files, and temporary files.



(Help index: **Customize - file locations**)

Sources

Choose settings for AutoSource, Source Surety, and whether or not to print Master Source and Detail Source text and comments on reports.



(Help index: **Customize - sources**)

View

Choose options for how things look on the screen. These include showing the birth-death range at the end of names; RINs, AFNs, FSIDs, Find A Grave IDs, BillionGraves IDs, or User IDs at the end of names; the displaying of the built-in ancestor coloring system; the use of short location name; choosing how many columns of children to display; three-dimensional borders; choosing which headings to use on the *Family View*; using the *Master Location List* with or without maps; showing thumbnail pictures on the *Family View*; showing status terms on the Family View; showing Potential Problems icons; the term to use for aunts and uncles; performing background Hint searching and displaying the results; and which style of labels and prompts to use in Legacy (Traditional or Gender-Neutral).



(Help index: **Customize - view**)

Colors

You can change the background color of some of the main input forms.



(Help index: **Customize - Customize colors**)

Fonts

You can change the fonts used for screen forms and printed reports.



(Help index: **Customize - fonts**)

Launch

Legacy offers to start your web browser, word processor, or text editor to view web pages or reports that you have generated. Normally, the default program for your computer is used. You can override these settings and use different programs to view the results by filling in one or more of the program fields.



(Help index: ***Customize - launch***)

Other Settings

Miscellaneous settings concerning message boxes, report credits, RIN number warnings, automatic backup at program exit, at what age people should be presumed dead, toolbar location, custom ID # setting, and toolbar picture size.



(Help index: ***Customize - other settings***)

Fixing Mistakes

Removing an Individual



(Help index: ***Remove an individual***)

Unlinking a Child From Parents



(Help index: ***Unlink child from parents***)

Unlinking a Spouse



(Help index: ***Unlink spouse***)

Attaching a Child to Parents



(Help index: ***Attach child to parents***)

Attaching a Spouse



(Help index: ***Attach spouse***)

Swapping Husband and Wife



(Help index: ***Swap husband and wife***)

Married to the Same Spouse More Than Once



(Help Index: ***Married to the same spouse more than once***)

Global Spell Checking

You can have Legacy run through your entire family file and check the spelling on any note-type field. You can even stop and resume at will.



(Help index: ***Global spell checking***)

Master Lists

Legacy keeps several master lists of commonly used information in a family file. For example, the *Master Location List* contains all the location names that are being used in the current family file. Legacy only records one copy of each location and points any use of it to its entry in the list. This saves a lot of disk storage space by eliminating duplications.

To view a master list, choose **Master Lists** from the **View** tab of the **Ribbon** bar.

Master lists have many great options that let you maintain the information in your file. See the following Help topics for more information:

Master Address Lists contains the records used for addresses in the family file.
(Includes mailing addresses, event addresses, and repository addresses.)



(Help index: ***Master address list***)

Master Child-Parent Relationship List contains the child-parent relationships in the family file.



(Help index: ***Master child-parent relationship list***)

Master Child Status List contains the child status names in the family file.



(Help index: ***Master child status list***)

Master Event Name Maintenance contains the event names in the family file.



(Help index: **Master Event Name Maintenance**)

Master Location List contains the names of all the locations in the family file. Each location also has a **Short Location Name**, **Location Notes**, **Pictures**, **Latitude** and **Longitude** values, and a **Verified** tag.



(Help index: **Master locations list**)

Master Marriage Status List Contains the marriage status names in the family file.



(Help index: **Master marriage status list**)

Master Media Folder List Contains the drive and folder locations for all the picture, sound, and video files in the family file.



(Help index: **Media: Locations**)

Master Source List Contains the main source definitions that are cited from any piece of information in the family file.



(Help index: **Master source list**)

Master Source Type List Contains the names of all the source types (book, bible, newspaper, etc.) in the family file.



(Help index: **Master source type list**)

Master Surname List Contains all the surnames in the family file.



(Help index: **Master surname list**)

Master Temple Name List Contains the names of all the LDS temples in the family file.



(Help index: **Master temple list**)

Master To Do Category List Contains the names of all the categories used in the To-Do items in the family file.



(Help index: **Master To-Do category list**)

Master To-Do Locality List Contains the names of all the localities used in the To-Do items in the family file.



(Help index: **Master To-Do Locality List**)

Set Living Status

There are several Legacy reports, plus web pages, where the privacy of anyone whose **Living** status is set to **Yes** is protected by suppressing all personal details. When creating these reports, no information is included for ancestors born centuries ago if they are inadvertently left set as Living.

Normally, an individual's **Living** status is set at the time the record is manually entered. The process is automatic if that person's death or burial information is entered or that person's birth or christening date is more than 120 years ago. If no birth, christening, death, or burial information is entered, that person's status remains at the default **Yes**, unless manually changed to **No**.

It is an easy task to set the **Living** status of a few individuals manually, but the task can become formidable when adding hundreds or thousands of new names to your family file with a GEDCOM import. This is where the **Set Living** and **Advanced Set Living** utilities come in handy.



(Help index: **Set living**)



(Help index: **Advanced set living**)

Importing and Exporting Data

Transferring Information To and From Other Programs

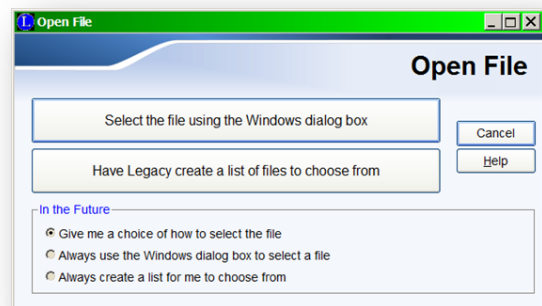
What Is a GEDCOM File

GEDCOM files are used to transfer genealogical information from one program to another. (See GEDCOM Files in the **Help** menu for more information.) Legacy imports and exports many different versions of GEDCOM files, recognizing nearly every variation from other programs.

Tip: The *Import Wizard* makes importing GEDCOM, Legacy, and PAF files a snap. Just choose **Import** from the **File** tab of the **Ribbon** bar and then choose **Use Import Wizard to help with any import** from the dropdown menu. Legacy then searches all available drives for the file type you select and displays them in a list. Highlight the file you want to import and click **Next**. The rest is easy.

Importing GEDCOM Files

To import a GEDCOM file into Legacy, choose **Import** from the **File** tab of the **Ribbon** bar and then choose **GEDCOM File...** from the dropdown menu. The first thing to appear is the *Open File* window. You can either click the top button, **Select the file using the Windows dialog box**, and navigate to the GEDCOM file you want to import, or you can **Have Legacy create a list of files to choose from**, in which case Legacy will gather all the GEDCOM file names from your computer, show you a list, and allow you to choose which one to import. If you know where the GEDCOM file is located, the first option is probably the quickest...



After choosing the desired file to import, if the current family file contains existing



records, the *Import a GEDCOM File* dialog box appears and you can choose to either **Create a NEW Family File and add the GEDCOM information to it** (recommended) or **Add the GEDCOM information to the EXISTING Family File**. Then click **Proceed**.

If you are adding to your existing family file, Legacy prompts you to make a backup copy of it before starting the import. This is a wise practice and is recommended. If you are creating a new family file, you are prompted for a new filename. The GEDCOM Import window now appears:



Legacy first analyzes the GEDCOM file you selected to make sure it is valid and recognizable. This analysis pass also shows you how many individuals and families are contained in the file. If Legacy finds information that it does not know what to do with, a message is displayed. You can then tell Legacy where to put the information. (See *Importing GEDCOM Files* in the **Help** index for more information.) The submitter's name, address, and comments are also displayed along with the name of the program that created the file.

After the analysis pass, click **Start the Import**. Legacy reads the information from the GEDCOM file and places it in the appropriate family file. Anything that is not recognized is placed in an error file so you can see it later and decide what to do.

There are many options that can be used when importing a GEDCOM file. See the help topic for complete information.



(Help index: **Import, GEDCOM file**)

Importing Legacy Files

You can import one Legacy family file into another or into a new, empty file. When importing a Legacy family file, incoming records can be filtered, limiting them to focus group entries or tagged records only.

► To import a Legacy file:

1. From the **File** tab on the **Ribbon** bar, choose **Import** and then choose **Legacy family file...** from the dropdown menu.
2. Select the name of the Legacy file you want to import.
3. Click **OK**.
4. Decide if you want to import the Legacy file into the current family file or into a new family file, and click the appropriate button. If creating a new family file, Legacy prompts you for a filename before proceeding. Importing into a new file also allows Legacy to use the same ID numbers that were assigned to the individuals and marriages. If you import the records into an existing family file with existing individuals, Legacy may not be able to retain the incoming ID numbers because they might already be in use.
5. Set or change any of the options.
6. When you are ready to import, click **Start the Import**. Legacy imports the file while displaying a progress bar.
7. When the import is complete, Legacy asks if you would like to go through the *Merge* process. This procedure compares all the individuals in the combined family file to see if any of them are really the same person. This can easily happen when you import additional names into your family file.

Importing Options

There are many options that can be used when importing a Legacy file. See the help topic for complete information.



(Help index: **Import, Legacy file, Importing a Legacy file**)

Importing PAF Files

Personal Ancestral File (PAF) is a popular genealogy program that used to be published by The Church of Jesus Christ of Latter-day Saints. Legacy directly imports PAF 2.31, 3.0, 4.0, and 5.x files.

► To import a PAF file into Legacy:

1. From the **File** tab on the **Ribbon** bar, choose **Import** and then select the type of PAF file you would like to read. The File dialog box opens where you then select the PAF file you want to import.
2. Specify the drive and path of the PAF file. PAF 2.31 only stores one family file in any particular folder. You will be looking for **INDIV2.DAT**. PAF 3.0 and 4.0 store their information in files ending with a .paf extension.
3. Decide if you want to import the PAF file into the current family file or into a new family file, and click the appropriate button. If creating a new family file, Legacy prompts you for a filename before proceeding. Importing into a new file also allows Legacy to use the same ID numbers that were assigned to the individuals and marriages. If you import the records into an existing family file with existing individuals, Legacy may not be able to retain the incoming ID numbers because they might already be in use.
4. Set or change any of the options.
5. When you are ready to import, click **Start the Import**. Legacy imports the file while displaying a progress bar.

Importing Options

There are many options that can be used when importing a PAF file. See the help topic for complete information.



(Help index: **Import, PAF file, How to import a PAF file**)

Import Wizard

Use the Import Wizard to help with any import.

1. From the **File** tab of the **Ribbon** bar, choose **Import** and then choose **Use Import Wizard to help with any import**.
2. From the *Import Wizard* dialog box indicate the type of file to import from the following items:
 - a. PAF 2.31 or Ancestral Quest 2.x file
 - b. PAF 3, 4, 5 or Ancestral Quest 3.x file
 - c. Any GEDCOM file.
 - d. Another Legacy family file
3. Click the **Next** button

4. Legacy automatically searches your drives for all files of the selected type and return a list.
5. Click once on the file you want to highlight it and then click the **Next** button.
6. You are then prompted to either create a new file and add the information to it or add the information to an existing Legacy file.

Merging Event Definitions



The *Merge Event Definition* window appears when you are:

- Importing the Master Event Definition List from another family file
- Importing a GEDCOM file with event definition records
- Combining duplicate location in the Master Event Definition List.

And the information items are not all identical.

This screen allows you to select or combine the differing information into each merged event definition record.

To merge an event definition:

1. Choose the desired fields to show. (Choose from Description, Date and Place.)
2. Edit the event sentence definitions. If you want to copy the right definitions to the left, replacing them, click the  button.
3. If you want to copy all the fields from the right record to the left, click .
4. Click **Save** to save the merged event definition on the left.

Automating the Merge

- To always keep the existing definition information no matter what the other event shows, choose the **Always keep the existing event definition** option before saving the current record.
- To always accept the incoming definition information, including its blank fields, if any, choose the **Always overwrite the existing event with the incoming event** option.
- To copy information from the incoming event that is missing from the current event, choose the **Always copy the incoming event items that are missing from the existing event** option.

Choosing one of these options effectively turns off the displaying of the *Merge Event Definition* window for the remainder of the current operation.

Exporting GEDCOM Files

If you want to send part or all of the information in your family file to someone who is not using Legacy, you can do so by exporting a GEDCOM file. (If you are sending all your information to someone using Legacy, the easiest way is to just send them a backup copy of the family file. If you want to send just part of the file, such as a particular person and their ancestors, you can tag those people and export a GEDCOM from them.)

► **To export a GEDCOM file from Legacy:**

1. From the **File** tab of the **Ribbon** bar, choose **Export** and then choose **GEDCOM file** from the dropdown menu.
2. Select the type of GEDCOM file to produce.
3. Click **Record Selection** to change the records you want to include in the file.
4. Click **Compiler** to make sure the information about you - the submitter or creator of the GEDCOM file - is correct.
5. If you want to change the default list of field information to be included in the GEDCOM file, click **Customize**.
6. When you have made all the desired settings, choose **Select File Name and START EXPORT**.
7. Select the folder where you want the file to be created and type a name into the *File Name* box in the upper-left corner of the window. Often, an appropriate surname or abbreviation makes a good file name.

Producing a GEDCOM File

For Legacy GEDCOM files destined for Legacy contain ALL the information that can be entered into a Legacy family file. This includes all individual field information; all notes; all sources; all events; LDS ordinance dates and temple names; pictures; sound; video; list ordering and tags; as well as preferred children; spouses; and parents. This GEDCOM file conforms to the GEDCOM 5.5 specification (with some extensions) and contains the most information. If you are exporting a GEDCOM file to be imported into Legacy or most other genealogy programs, with the exception of Personal Ancestral File (PAF), you should probably choose this option.

For GEDCOM 5.5.1 Only Many other programs do not have a place to put all the information that Legacy handles, and an error file is generated. If you would like to limit the export fields to mostly those accepted by other programs, choose this option.

PAF 2.31 and PAF 3.0 / 4.0 / 5.0 Since Personal Ancestral File is now used in four different versions, 2.x, 3.x, 4.x, and 5.x, and since they each handle notes, sources, and repositories in radically different ways, it is necessary for Legacy to produce four special GEDCOM formats to satisfy the special needs of these programs. Select the desired format.

Pedigree Resource File This format is used when contributing your information for inclusion in the LDS Church's new Pedigree Resource File. This file is similar to the Ancestral File but the contributed files are left as received, and no attempt is made to link multiple files together. Submission can only be done through the Internet.



(Help index: ***Pedigree Resource File***)

Basic This GEDCOM file contains only the vital statistics. This type of GEDCOM file contains name, sex, birth, christened, death, buried, and marriage information.

Generic This GEDCOM file contains name, sex, birth, christened, death, buried, marriage, user ID number, notes, sources, events, baptism, and marriage status.

Ancestry Online Family Tree This file contains individuals and marriages to be exported for uploading to Ancestry Online Family Tree.

MyTrees.com This file contains individuals to be exported for uploading to MyTrees.com.

OneGreatFamily.com This file contains individuals to be exported for uploading to OneGreatFamily.com.

Exporting Options

There are many options that can be used when exporting a GEDCOM file. See the help topic for complete information.



(Help index: ***Export, GEDCOM files***)

Exporting to a Legacy File

You can export a Legacy family file to create another Legacy family file or to append to another, existing family file. When exporting a Legacy family file, you can filter the outgoing records, limiting them to focus group entries or tagged records only. Since you can tag an individual and all his/her ancestors or descendants, this is a good way to break a large family file into smaller, more manageable pieces.

► To export a Legacy file:

1. From the **File** tab of the **Ribbon** bar, choose **Export** and then choose **Legacy file** from the dropdown menu.
2. Select a name for the Legacy file you want to create or the Legacy file you want to append to.

3. Click **OK**.
4. Set or change any of the options. (Each is described below.)
5. When you are ready to export, click **Start the Export**. Legacy exports the file while displaying a progress bar.

Exporting Options

There are many options that can be used when exporting a Legacy file. See the help topic for complete information.



(Help index: **Export, Legacy files**)

Merging Duplicates

Combining Two or More People Who Are Really the Same Person

Introduction to Merging

Legacy is unique from all other genealogy programs in the strength and flexibility of its merge program. Legacy offers the user complete control while combining records. We call it IntelliMerge™.

As your family file grows larger, either by entering new individuals and families, or by importing other family files and GEDCOM files, you may find that you have some people in your file more than once. You can either edit the two individuals manually, trying to also take into account any children, spouses, and parents, or you can use Legacy's powerful merge capabilities. In fact, it is suggested that you do not try to manually combine individuals who are linked to other relatives. It can be very frustrating and can lead to a jumbled mess.

The whole concept underlying the merge capability in Legacy is the process of integrating duplicate records as a result of importing records from another GEDCOM or PAF file with the existing records in the current family file. (Or from entering a person more than once.) This process is a very sensitive one because it ultimately means that the current family file, when the merge is complete, is changed to reflect the combination of the new information.

In many instances, one record will contain duplicate—and possibly enhanced—information on an individual or marriage in the current family file. Because of this, it is essential for the user to have the option to review both the current data and the imported data on a screen where both can be observed at the same time.

All of the above must be addressed, and decisions must be made and plans implemented in order to achieve a successful merge of data. By letting Legacy help you do these tasks, hundreds of hours can be saved over inputting the data manually.

Sound judgment suggests that the user make a backup of existing data before implementing any merge. This can be accomplished by using the **Backup File** option on the **File** tab of the **Ribbon** bar.

Legacy offers several methods to merge records in a family file. These include *Manual Merge*, where you initiate the process by selecting two individuals; *Find Duplicates*, where Legacy starts the process by comparing all the individuals in the entire family file and creating a list of possible duplicates; and *IntelliShare*™, which lets you share your

family file with others and then integrate all the changes made by the various people back into the master file.

The merge process is exactly that—a PROCESS. Rarely do you just combine two people together. Most often it involves connections to other individuals such as children, spouses, siblings, and parents. It is important to properly handle the surrounding links, and the links surrounding the links, and so on.... Legacy is an expert at the merge process. When you tell the program to combine two people, Legacy looks around to see who else should be considered for a merge. It then automatically adds them into the process. This goes on until all the associated links have been handled. You may begin by thinking that you are going to merge only two individuals, but you end up merging an entire family line. *This is the only way to do it correctly.*

For example: Let's say you notice two men in your family file who you think are the same person, William Johnson and Will Johnson. You start a merge process by clicking **Merge**. Legacy compares the two individuals and shows you the differences, if any, between the information contained in the two records. After looking the information over, you decide that they are indeed the same person and click **Merge Right Individual Into Left Individual** to combine them. Legacy takes a look around and notices that William has two parents linked to him, named Daniel Johnson and Mary Anderson. Will Johnson has two parents, named D. Johnson and Mrs. Johnson. These two sets of names look like they could be the same parents, so Legacy adds them into the merge process. The next two people to be displayed are Daniel Johnson and D. Johnson, and then Mary Anderson and Mrs. Johnson. The process is continued until all possible duplicates in that line are presented. This goes also for ancestors, siblings, spouses, and children. The end result is a combination of names, information, and links for everyone in the line who is related.

Manual Merge

If you have come to the *Merge Two Individuals* window by clicking the **Merge Duplicates** button on the **Tools** tab of the **Ribbon** bar and then choosing **Manual Merge** from the dropdown menu, the current individual is automatically loaded on the left side. You must now select the second individual by clicking the **Select Right** button and choosing the name from the *Name List*. After selecting the right individual, the merge procedure can progress as outlined in the *Merging Two Individuals* section on page 232.

Finding Duplicates

Click the **Merge Duplicates** button on the **Tools** tab of the **Ribbon** bar and then choosing **Find Duplicates** from the dropdown menu.

Merge Options

There are many options that can be used when merging. See the help topic for complete information.



(Help index: **Merge, Options**)

Special Searches

The *Special Searches* screen allows for specific matching on **Ancestral File Numbers**, **User Reference Numbers**, and **IntelliShare** numbers.

Three special-case searches are provided by Legacy. The first two processes only look at the **Ancestral File Number** or the **User Reference Number** when determining matching individuals. No other information is used. *If you are not using either of these number fields, these special searches won't be of any use.*

Ancestral File Numbers are assigned by The Church of Jesus Christ of Latter-day Saints (Mormon) to all records submitted to them. When this data is compiled it is provided on CD-ROM to the Family History Centers located throughout the world. Data acquired from these locations or from the Church Family History Center in Salt Lake City, Utah all contain an **Ancestral File Number**.

User Reference Numbers can be assigned by the individual within the program for accommodating special needs.

IntelliShare Numbers are unique numbers assigned to each individual in your family file as you enter and import records. When merging, any two records with the same IntelliShare numbers are considered the same person.

Merging Two Individuals

From the *Merge Options* window, click **Continue**. The *Merging Two Individuals* window appears.

Use these buttons to copy the other information you want to keep to either *Notes*, *Alternate Names*, or *Events*.

Fields that are different:

Field	Left Individual	Right Individual
Given Name	<input type="radio"/> Eleanor	<input type="radio"/> Eleanor R.
Death Loc	<input type="radio"/> Saint Cloud, Stearns, Minnesota, United	<input type="radio"/> Saint Cloud, Stearns, Minnesota
Baptism Date	<input type="radio"/> 24 Jun 1995	<input type="radio"/>
Baptism Temple	<input type="radio"/> PORTL - Portland Oregon Temple	<input type="radio"/>
Endow Date	<input type="radio"/> 17 Jan 1996	<input type="radio"/>
Endow Temple	<input type="radio"/> PORTL - Portland Oregon Temple	<input type="radio"/>
Events	<input type="radio"/> Keep Left (See Event Tab)	<input type="radio"/> Keep Right (See Event Tab)
Media	<input type="radio"/> Keep Left (See Media Tab)	<input type="radio"/>

Click the Left or Right option button next to the information to keep

Edit Left Select Left Swap Left / Right Select Right Edit Right

Merge Right Individual into Left Individual

Options Close Help AutoMerge

These ten tab pages show you all the information you need in order to decide if the two people are really the same person.

This box shows the information that is different between the two individuals.

What Does This Window Show?

The *Merging Two Individuals* window shows two individuals side-by-side who could be the same person. There are nine tabs across the top, corresponding to the various pieces of information both individuals have. When a pair is first displayed, the *General* tab is selected automatically.

The record of the individual shown at the left of the screen is the one that will ultimately remain in the current family file. The individual on the right, if the two are merged, will be combined with the left.

Below the tab pages are several command buttons and a checkbox:

Edit Left displays the *Information* window for the individual on the left, allowing you to edit his or her information.

Select Left lets you change the left person to someone else if you are in manual merge mode. (This button is not visible if you are doing automatic duplicate searching.)

Swap Left / Right trades the positions of the two individuals. The person on the right moves to the left side and the person on the left moves to the right. (The person on the left is always the individual who is retained. The information and links from the person on the right are merged into the left.)


Edit Right displays the *Information* window for the individual on the right, allowing you to edit that information.

Select Right lets you change the right person to someone else if you are in manual merge mode. (This button is not visible if you are doing automatic duplicate searching.)

Merge Right Individual into Left Individual performs the actual merge operation. The information that has been selected from the person on the right is moved into the record of the person on the left. The relationship links from the person on the right are also moved to the person on the left. The person on the right is then deleted from the family file. This button should only be clicked after you are sure you want to merge the two individuals. If there are any questions as to whether these are indeed the same person, you should do more research before merging them.

Skip to Next skips the current pair of individuals and moves to the next pair of possible duplicates. (This button is only visible if you are doing automatic duplicate searching.)

Back displays the most recently skipped pair of individuals. Successive clicking of this button moves back through all the skipped pairs. (This button is only visible if you are doing automatic duplicate searching.)

Not Duplicates  indicates that the two individuals are not the same person. They are added to the Not Duplicates list and are not shown in subsequent merge sessions.

Options

Print: You can print a Family Group Record or Individual Report for the current pair of individuals. This may help you decide if they are the same person. (See Merge Information Report for more details.)

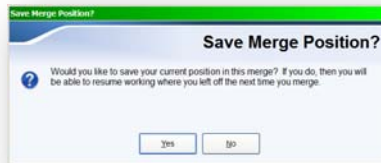
Mark this pair as 'Not Duplicates: There always seems to be some pairs of individuals in your family file that have similar names and vital information. When merging duplicates these pairs get displayed every time. You know they are different people and just wish they could be marked as such and left out of the merge process. This option lets you mark the currently displayed pair of individuals as not being duplicates. After doing so they will not be displayed in

the future when you are merging duplicates. (You can remove pairs from the Not Duplicates list whenever you want.) Alt -X is also available as a shortcut key for this feature. (Deluxe Edition only.)

Display the ‘Not Duplicates’ List... shows the list of people currently marked as not being duplicates. (See Not Duplicates List for more information.) (Deluxe Edition only.)

Zoom lets you change the font size in the list windows.

Close stops the merge process and returns to the *Family/Pedigree* screen. Your location in the merge process is saved to disk so that you can resume the process at a later time. Remember, merging records is a process that must be completed from beginning to end in order for the operation to be successful. If you **Close** in the middle of a merge, Legacy asks if you would like to continue at a later time. Answering **Yes** causes Legacy to save the current location. Later, when you choose **Merge Duplicates > Find Duplicates** from the **Tools** tab of the **Ribbon** bar again, Legacy shows the following message:



Print prints a Family Group Sheet or Individual Report for the current pair of individuals. This may help you decide if they are the same person.

Help displays the *Help* system, which shows information regarding the topic on the screen.

AutoMerge automatically merges when the information for two individuals is complete enough and matches exactly. If this option is checked, Legacy will ask you if you would like to use the AutoMerge option when the first pair that is eligible for auto-merging appears.

General Tab

Merging Two Individuals

*General *Family *Events Stories *Media Notes Research Medical Addr *LDS

	Eleanor Huffman [34]	Eleanor R. Huffman [99]
Birth	11 Jan 1803 Kingston, Frontenac, Ontario, Canada	11 Jan 1803 Kingston, Frontenac, Ontario, Canada
Christening		
Death	3 Jun 1874 Saint Cloud, Stearns, Minnesota, United	3 Jun 1874 Saint Cloud, Stearns, Minnesota
Burial		
Pref Spouse	Asa Clark Brown [1] m.8 Mar 1832 Tionesta, Venango,	
Pref Father	John Huffman [100]	
Pref Mother	Molly Smith [144]	

Fields that are different: Click the Left or Right option button next to the information to keep

<input type="checkbox"/> Given Name	<input checked="" type="radio"/> Eleanor	<input type="radio"/> Eleanor R.
<input checked="" type="checkbox"/> Death Loc	<input checked="" type="radio"/> Saint Cloud, Stearns, Minnesota, United	<input type="radio"/> Saint Cloud, Stearns, Minnesota
<input type="checkbox"/> Baptism Date	<input checked="" type="radio"/> 24 Jun 1995	<input type="radio"/>
<input type="checkbox"/> Baptism Temple	<input checked="" type="radio"/> PORTL - Portland Oregon Temple	<input type="radio"/>
<input type="checkbox"/> Endow Date	<input checked="" type="radio"/> 17 Jan 1996	<input type="radio"/>
<input type="checkbox"/> Endow Temple	<input checked="" type="radio"/> PORTL - Portland Oregon Temple	<input type="radio"/>
<input type="checkbox"/> Events	<input checked="" type="radio"/> Keep Left (See Event Tab)	<input type="radio"/> Keep Right (See Event Tab)
<input type="checkbox"/> Media	<input checked="" type="radio"/> Keep Left (See Media Tab)	<input type="radio"/>

5 of 5

Edit Left Swap Left / Right Edit Right

Merge Right Individual into Left Individual Skip to Next Back

Options Close Help AutoMerge

This tab shows two individuals from your file including names, and when they were born, christened, died, and buried. It also shows the *preferred* spouse's name and the *preferred* parents. Below this information is the *Fields that are different* box. This section shows a list of all the information that is different between the two individuals. Each piece of information has an option button to the left of it. The option button shows which piece will be kept. You can change the settings by clicking on the option button next to the information you want to keep. If the list is taller than the box, a scroll bar appears to the right, which can be used to display subsequent information.

Preserving Information

When you are merging duplicate individuals, you will often want to save some of the information from the person you are deleting. Legacy allows you to copy this information to several different places, depending on what kind it is. This is done by clicking the small black button to the left of the desired field in the **Fields that are different** window. This opens a shortcut menu asking where you would like to copy the information.

Names You can either create an entry in the *Alternate Names* list or copy the name to the General Notes field.

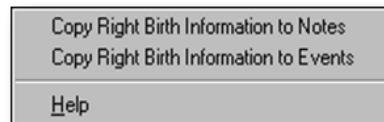
Birth, Christening, Death, and Burial Information You can create an *Event* entry made up of the date and place, or you can copy the information to the General Notes field.

► **To copy a piece of information:**



1. Click the small black buttons to the left of the information in the *Fields that are different* box. Only lines that can be copied will have the button.

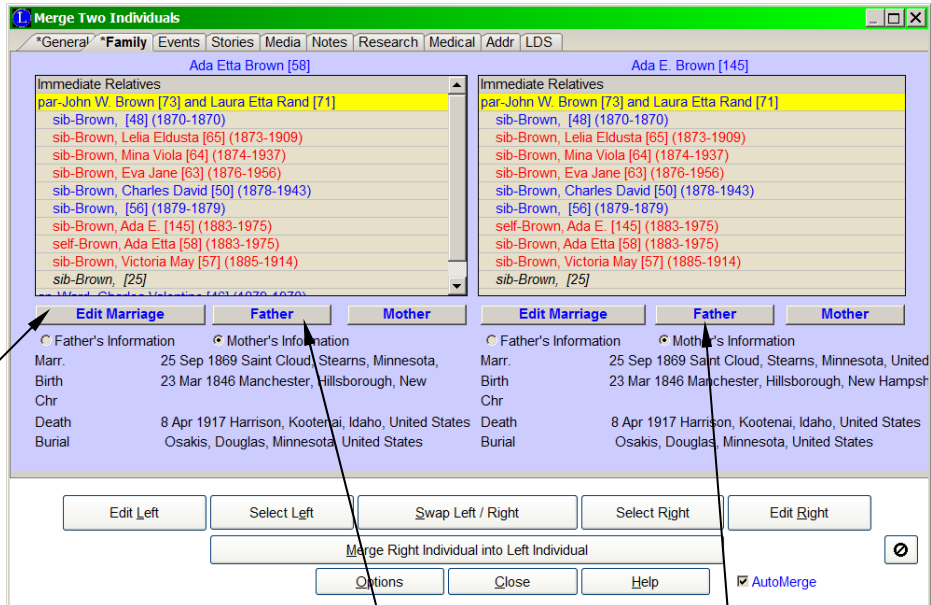
A shortcut menu appears with the appropriate choices.



2. Select the destination field for the information. Only the allowable destination fields will appear on the shortcut menu. The information that is not marked to be kept (the empty option button) is then copied to the selected destination.

Family Tab

This screen shows all the surrounding relationship connections to each person. It includes the parents, siblings, spouses, and children. This information is often very helpful when trying to determine if the two individuals are the same person. The birth, christened, death, and buried information for the currently highlighted person is displayed below the list.



Click to edit the marriage information for the highlighted person.

Click to show the Father's information below.

Use these buttons to edit the Mother's or Father's information.

If the highlighted line is a marriage with two names on it, one of the option buttons below the list indicates whether the mom's or dad's information is shown. Click the other option button to switch to the other person. Other buttons let you edit the Marriage, Dad, Mom, Children, Siblings, or Self.

Note: Sometimes you will notice duplicate parents, spouses, or children in the Family List. Don't be alarmed; this is common while you are in the middle of a merge process. These duplicates will be reconciled later as you continue on.

Events Tab

This screen shows a list of all additional events recorded in each person's record. As you click each event line, the details of that event are displayed below the list. Using the buttons at the bottom of the screen you can perform the following functions:

Edit Left allows you to edit the left, highlighted event. (Any event can be highlighted by clicking it.)

Delete Left deletes the highlighted event in the left window.


Delete All Left deletes all the events in the left window.

Copy copies the highlighted event from the right window to the left window, adding it to the end of the list.

Copy All copies all the events from the right window to the left window, adding them to the end of the list.

Edit Right allows you to edit the right, highlighted event.

Event Sources

You can view, add, edit, or delete the source citations connected to the events on the left or right side by clicking the corresponding **Source**  button.

Pictures Tab

This screen shows any pictures that have been attached to each individual, along with their captions, dates, and descriptions. If a sound file is connected to a picture, it is shown also.

Using the buttons at the bottom of the tab you can:

Edit Left allows you to edit the left, highlighted picture. (Any picture can be highlighted by clicking it.)

Delete Left deletes the highlighted picture in the left window.

Delete All Left deletes all the pictures in the left window.

Copy copies the highlighted picture from the right window to the left window, adding it to the end of the list.

Copy All copies all the pictures from the right window to the left window, adding them to the end of the list.

Edit Right allows you to edit the right, highlighted picture.

Notes Tab, Research Tab, Medical Tab

The Notes, Research, and Medical tabs display the various Note fields associated with each individual. Using the buttons at the bottom of the tabs you can:

Delete Left deletes the contents of the Notes field on the left.

Replace copies the note from the right window to the left window, replacing the contents of the left note.

Append copies the note from the right window to the left window, adding it to the end of whatever is in the left window.

The Research tab has a **To-Do** button for each individual allowing you to add to-do items for further research.

The Medical tab also shows the **Cause of Death** field. There is a **Copy** button between the two individuals that allows you to copy the contents in the right field to the left field, replacing whatever is in the left field, if anything.

Addr/Ref # Tab


The *Address / Reference* tab shows the Ancestral File Number, User Reference Number, and the address entry for each individual.

Using the buttons at the bottom of the tab you can perform the following functions:

Edit Address allows you to edit the address entries above the button.

Delete Left clears the contents of all the address and phone fields on the left.

Copy Addr copies the contents of all the address and phone number fields from the right window to the left window, replacing the contents of the left address.

Between the individuals shown on this tab is a  button that can be used to copy the contents of the corresponding right field to the left, replacing it with the contents of the right field, if anything.

LDS Tab

This tab shows the LDS ordinance date and temple fields for each individual, if used.

Using the buttons at the bottom of the tab you can perform the following functions:

Edit Left allows you to edit the LDS ordinance fields on the left.

Delete Left clears the contents in the current, highlighted ordinance field on the left.

Copy All copies all the ordinance information from the right window to the left window, replacing the contents of the left fields.

Edit Right allows you to edit the LDS ordinance fields on the right.

IntelliShare

Legacy has a great feature called IntelliShare. It is used when you want to share your family file with another person or group of people, and lets you quickly combine the changes made by anyone in the group without having to stare at endless duplicates on the screen as you merge.

Here is how IntelliShare works:

One person in the group is designated as the “keeper of the records” (keeper, for short).

1. The keeper, sends a copy of the family file to all the other members of the group participating in the process.
2. Any or all members of the group can make changes to existing records and add new records to the family file. The keeper can also make changes and additions to the master file.
3. At an agreed upon interval, all members of the group return their copies of the family file to the keeper, who will merge and reconcile.

The keeper then follows this procedure:

► **To merge and reconcile:**

1. Import all copies of the family file into the master copy.
2. Click **Merge** and choose **Find Duplicates**.
3. From the *Merge Options* window, click the **Special Searches** tab and choose the **IntelliShare** option.
4. Click **Continue** in the upper-right corner of the *Merge Options* window. Legacy searches for all records with matching IntelliShare values and then automatically merges those that have exactly the same information. At the end of this process Legacy displays the records in which changes have been made by one or more persons.
5. Merge the records. (See page 232.)
6. After the merge is complete, send the family file back to the other group members for future changes and additions.

Undoing a Merge

There may be times when you want to start all over again. Either you merged two people who were not really the same person, or you want to go through it all again to make sure you saved the correct information in the correct places. Either way, if you stop in the middle of a merge and don't ever intend to complete it, you should restore from the automatic backup that was made when you started. This option is available by choosing **Undo Merge** from the **Edit** tab of the **Ribbon** bar. Legacy asks you to confirm the restoration from backup and then returns the family file to its condition before the merge process started.

Pictures, Sounds, Videos & More

A Picture Is Worth a Thousand Words, Especially if it Can Talk

You can attach any number of pictures, sound files, video files, web sites, and other types of files to any individual, marriage, event, source, location, or address repository in your family file. Legacy reads all popular file formats. These can then be displayed at any time and the pictures can also be included in many printed reports.

When Legacy is installed, a folder called **Media** is created within the Legacy Family Tree folder in your My Documents folder. It is strongly recommended that this folder be used to store the pictures, sounds, videos, and other documents.

It should be noted that Legacy does not create pictures. Pictures must be scanned by using a quality scanner, or supplied from another source such as a digital camera, or downloaded from a web site or sent to you by e-mail, etc.

It should also be noted that in order to add and edit sounds, the computer must be equipped with a sound card. A microphone must be plugged into the sound card or USB port in order to record sound files.


Adding Pictures

You can add links to picture files for each individual or marriage, to events, sources, and addresses. There are two processes you can use to add pictures. The first is to use the *Media Gallery*, the second is to use the *Picture Center*. The *Media Gallery* method is done from a specific individual, marriage, or event and involves selecting pictures (or sounds, videos, documents, or web links) that you want to link to that particular person, marriage, or event. The second method, using the *Picture Center*, involves viewing a list of all the individuals and all the pictures, and indicating which pictures go where. The *Picture Center* lets you easily attach a lot of pictures to a lot of people, marriages, and events in a short amount of time.

Media Gallery

Adding Pictures (or other media files)

► To add a picture to an individual:

1. From the *Family View*, make sure the individual is in either the *Husband* or *Wife* box and then click the **Media**  icon on their individual toolbar. (That is the button with the picture of two people.) The *Media Gallery* appears.

The *Media Gallery* displays from one to nine pictures or other types of media files at a time, although you can have an unlimited number of media files attached to each individual.

2. Click the **Add Media...** button and choose **Picture** (or **Sound, Video, Document, Web Link**). This opens the *Load Picture* window. Locate and select the name of the picture you want to add and then click **OK**. Legacy now asks if you would like to copy the file to the Media Folder. (This is a way to keep all the media associated with your family file in one place, making it much easier to share your family file with others or to copy everything to a different computer.) After answering the question, the picture is loaded and appears in the *Display Picture* window.

The *Display Picture* window lets you view an enlarged picture and allows you to add a caption, date, and description. You can also attach sound files, change the picture attributes, and convert the picture file to a different format.

3. Click **Close** to return to the *Media Gallery*.

You can continue adding new pictures or other media files using the procedure above.

As mentioned, you can also add sound files, video clips, documents, and web links. These, of course, do not print on reports but they are invaluable additions to the items they are linked to. Sound and video clips can be subsequently played by your default media player. Documents are opened in the program associated with the file type of the document (word processor, spreadsheet, PDF viewer, etc.). Web links are opened in your default browser.

Deleting Pictures

► To remove a picture from the *Media Gallery*:

1. Highlight the picture by clicking in the **Caption** area below the picture.
2. Click **Remove**. Legacy prompts for confirmation and then unlinks the picture from the individual. The media file itself is not deleted ... only the reference link is erased.

Reordering Pictures

You can move pictures from one position to another by dragging them with the mouse. With the cursor over a picture, hold down the left mouse button and drag it to a new location. Releasing the mouse button puts the dragged picture in its new location and moves the other pictures one place over to make room.

Setting the Preferred Picture

When you first begin adding pictures, the picture in the first position is considered the *preferred* picture. This picture is displayed on the *Family View* and *Pedigree View* whenever the individual is current. The *preferred* picture is also printed on reports that include pictures. To mark a different picture as *preferred*, right-click on it and then choose **Set as Preferred** from the popup menu. An asterisk appears in front of the picture number.

Displaying and Editing a Picture

To see an enlarged view of a picture, right-click on it and choose **Edit** from the popup menu. The picture is loaded into the *Display Picture* window. From there you can add a caption, date, and description to the picture. You can also change picture attributes such as brightness, sharpness, and contrast as well as rotate, zoom and crop the picture.

Adding Sound to a Picture

Legacy supports sound files in two ways. First, a picture can have a sound file linked to it. Second, sound files can be added to an individual without tying them to pictures.

► **To add a stand-alone sound file to an individual:**

1. Click the **Add Media** button and choose **Sound**.
2. Specify the location of the sound file.

► **To link a sound file to a particular picture:**

1. Right-click on the picture and choose **Edit** from the popup menu.
2. From the *Display Picture* screen, click the **Sound** button. (See *Adding and Recording Sounds* on page 282 for more information.)

If you have a sound file attached to a picture, you can play it by highlighting the picture and then clicking the **Options** button and then choosing **Play**.

Adding Video to an Individual

► **To add a video file to an individual:**

1. Click the **Add Media** button and choose **Video**.
2. Specify the location of the file.


To play a video file once it has been added, highlight it and then click the **Options** button and then choose **Play**.

Adding Other Documents to an Individual

► **To add a document or other type of file to an individual:**

1. Click the **Add Media** button and choose **Document**.
2. Specify the location of the file.

Note that documents and other types of files that are attached in this manner will not be included on report or web sites. They are simply for documentation purposes. To


open a document, double-click on the  graphic representing it.

Adding Web Site Addresses to an Individual

► **To add a web site URL to an individual:**

1. Click the **Add Media** button and choose **Internet Website**.
2. Fill in the website URL, date, and description fields and then click **OK**.

Note that website documents and other types of files that are attached in this manner will not be included on report or web sites. They are simply for documentation

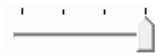
purposes. To display a linked web page, double-click on the  graphic representing it.

Zooming In and Out

To take a closer look at a picture, highlight it and click **Zoom**.

Showing More Pictures

The *Media Gallery* can display from 1 to 9 pictures at a time. Use the slider control to display more or fewer pictures.



Creating a Slider Show

To start a sliding picture show that contains all the pictures in the *Gallery*, click the **Options** button and then choose **Slider Show**.



(Help index: **Picture: Scrapbook options**)

Creating a Slide Show

To view a sequential slide show of all the pictures in the *Media Gallery*, along with their sound files, click the **Options** button and then choose **Slide Show**. (See *Slide Shows* on page 284 for more information.)



(Help index: **Picture: Scrapbook options**)

Printing a Photo Album

To print all the pictures in the *Media Gallery*, click the **Options** button and then choose **Photo Album**. The *Photo Album Options* window appears, where you can select the type of photo album layout you want to print. (See *Photo Album* on page 284 for more information.)



(Help index: **Picture: Scrapbook options**)

Tagging Pictures

The checkbox above the upper-right corner of each picture is used to tag or untag the picture. Tagging is useful when you want to select specific pictures to be printed on reports or displayed in screen shows or slide shows.

Resizing the Window

You can stretch the *Media Gallery* window by dragging its edges and corners. The picture boxes automatically resize when you do this. Legacy remembers the size and location of the window from session to session.

The Display Picture Window

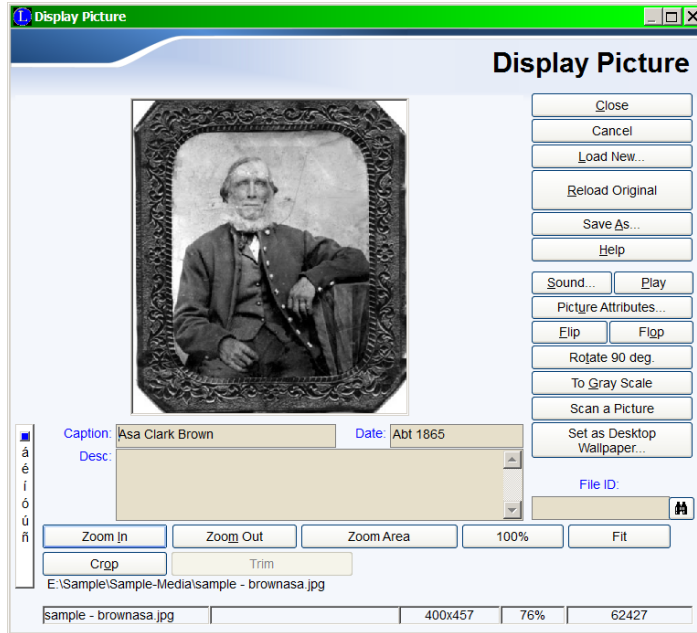
Adding a new picture or editing an existing picture is done from the *Display Picture* screen.

Loading a Picture

- ▶ **To load a picture into the main window:**
 1. Click **Load New**. The *Load Picture* dialog box appears where you can specify the picture file you want to view. As you scroll through the available picture files, they are displayed in the window to the right so you can make sure you are selecting the correct one.
 2. Click **OK** when you have found the desired picture.

Color Versus Black and White

Legacy supports the displaying and printing of both color and black and white pictures. Color pictures can be converted to gray scale (black and white) by clicking **To Gray Scale**. This is often necessary if you are printing reports with pictures on a non-color printer. Color pictures sent to a black and white printer often come out looking muddy and washed out.



Supported Formats

Legacy supports the loading, displaying, and converting of the following common picture file formats, as well as about 30 others:

- Bitmap (.bmp)
- PCX (.pcx)
- Tiff (.tif) (without LZW compression)
- PICT (.pct)
- JPEG (.jpg)

Zooming In and Out

Use the **Zoom In** and **Zoom Out** buttons to vary the magnification of the picture. To adjust the size to exactly fit in the window, click **Fit in Window**. To view the picture at 100% of its actual size, click **100%**. To zoom in to a particular area of a picture, click **Zoom Area** and then drag the mouse cursor over the area you want to magnify. When you release the button, the area within the drag rectangle is enlarged to fit the window.

Printing the Picture

Click **Print** to print the picture on your printer. A *Print Size* dialog box appears, where you can select the size you want to print the picture. This can be from full page to 1/8th page. When printing a picture, be patient. Some high resolution pictures can take a few minutes to print.

Converting to a Different Format

After loading a picture, you can save it again in a different format. Click **Save As**. The *Save Picture* dialog box appears. Click the **Down** arrow on the *Save File as Type* combo box. Select the file format you want to convert to and then enter a file name. Click **OK** to complete the conversion.

Editing a Picture

There are several attributes of a picture that can be permanently changed. These include brightness, sharpness, contrast, rotation, and color.

Brightness, Sharpness, and Contrast

Pictures that look blurry, dull, or washed out can be touched up to improve their appearance. Click **Picture Attributes** to see the *Adjust Display Attributes* window. Adjust the brightness, sharpness, and contrast controls and click **Apply** to see the effect on the picture. When you are happy with the changes, click **OK**. For the changes to be permanent, you must resave the picture by clicking **Save As**.

Rotating, Flipping, and Flopping

You can rotate a picture in 90-degree increments by clicking **Rotate 90 Deg**. This may be necessary if a picture was scanned sideways or upside down.

Click **Flip** to reverse a picture from left to right. Click **Flop** to reverse from top to bottom. For the changes to be permanent, you must resave the picture by clicking **Save As**.

Changing a Picture to Black and White

To convert a color picture to grayscale (shades of black and white), click **To Grayscale**. To retain the grayscale, you must save the picture.

Reloading a Picture

Sometimes the changes you make to a picture make it look worse rather than better. If you make changes that you don't want to keep, click **Reload Original** to reload the original picture from disk.

Adding Sound Files

You can add a sound file to the current picture by clicking **Sound**. (See *Adding and Recording Sounds* on page 282.) After a sound file is attached to a picture, you can play it by clicking **Play**.



(Help index: **Recording sounds**)

Cropping Pictures

If you want to select a portion of a picture and then crop it to show only that area, click **Crop**. The mouse cursor changes to a crosshair. Select the desired portion of the picture by dragging the cursor over it. As soon as you release the mouse button, the rest of the picture outside the rectangle disappears, leaving only the selected portion of the picture. If you want to change the position or size of the selection, click **Fit** to restore the original picture and try again. When you are satisfied that the selected portion is the only part you want to keep, click **Trim**. The picture then grows to fill the screen. It has been cropped and trimmed but it has not yet been saved. If you want to start over again, click **Reload Original**. If you want to keep the cropped picture you must save it; click **Save As** and choose a name and location. Don't save it over the original picture unless you don't want the original anymore.

Saving the Changes

When you have made changes that you want to keep, you must save the picture to disk. Click **Save As** and save the picture to whatever format you desire. This can be to the same format and filename as the original, or to either a different name, or format, or both.

Saving a Picture to a New Format

You can convert any picture into another format by selecting the format from the **Save as type** drop-down box on the **Save File** dialog box. The list includes Bitmap (.bmp), PCX (.pcx), Tiff (.tif) and JPEG (.jpg). After selecting the format type, click **Save**.

When you are through making changes to the picture, click **Close** to return to the *Media Gallery*.

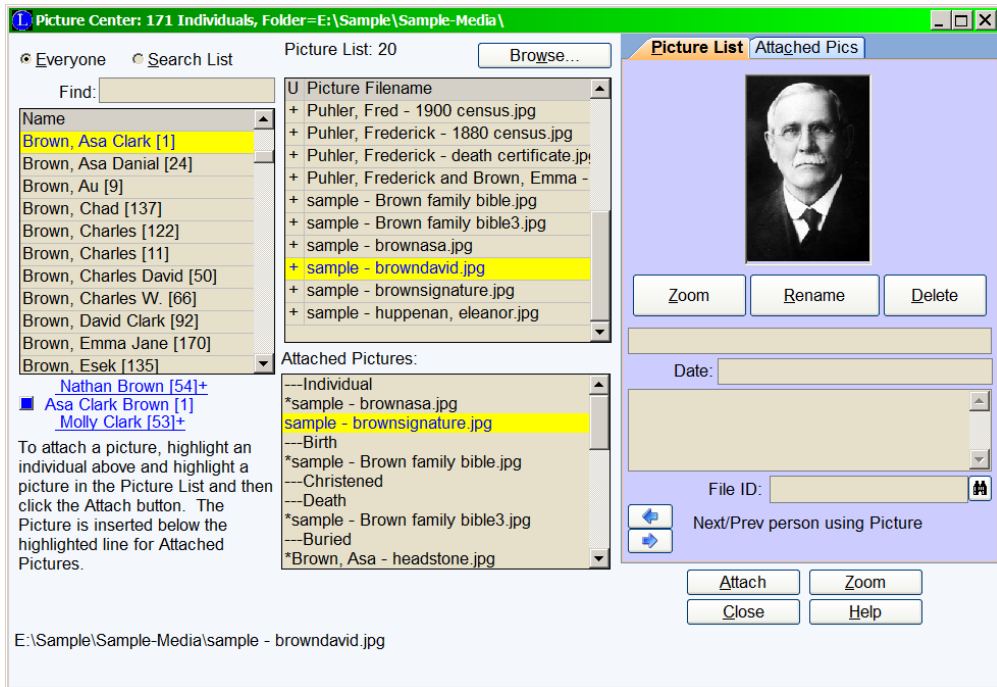
Picture Center

The **Picture Center** in Legacy is a very easy way to link many pictures to many individuals from one place. You will often come upon pictures in groups that you want to link to the people in your family file. For example, you might have a box or picture album of many pictures that you then scan into your computer. The pictures are associated with several different individuals. The **Picture Center** lets you link each picture to as many people in your file as your picture relates to—from one convenient place within the program.



To reach the **Picture Center**, choose **Picture Center** from the **Tools** tab of the **Ribbon** bar.

In its simplest form, there are three main sections to the **Picture Center** screen. On the left is a list of all the individuals in your family file. In the middle is a list of the pictures on your computer. On the right is a preview window showing the highlighted picture.



► **To assign a particular picture to a specific individual:**

1. In the left window, highlight the individual.
2. In the upper-center window, find and highlight the desired picture.
3. Click **Attach** near the lower-right corner. This adds the picture to the individual's picture list.

There are many options associated with this process. These are described below:

The Name List

By default, the **Name** list shows **everyone** in your family file. You can choose to show just the names that are in the current **Search List** by selecting the **Search List** option above the list.

The **Find** box above the list lets you quickly jump to anyone in the list by typing part or all of their name. Enter the name with the surname first, followed by a comma and then the given name(s). The highlight line jumps to the nearest match as you are typing.

Active Pedigree Chart

Below the **Name** list is a two-generation pedigree chart showing the currently highlighted person and his or her parents. You can jump to either parent by clicking

their names. There is also a button to the left of the main person. If the button is blue then it means that person has children and clicking the button takes you to the preferred child.

The Picture List

The **Picture Filename** list shows all the supported picture, sound, and video file formats supported by Legacy. The current folder name is shown in the title bar of the window. You can change to a different folder by clicking **Browse** above the list. To choose a particular picture, sound, or video, highlight the name by clicking on it. If it is a picture file, the picture will display in the preview window to the right (if you have the **Picture List** tab selected).

The **U** column to the left of the picture filenames indicates whether or not each picture has been assigned to someone in your family file already. The **+** means that picture in that folder has been assigned to someone. The **-** means that file name has been assigned to someone but from a different picture folder. For example, you may be looking at **grandpa.bmp** in the **Legacy\Pictures** folder but another file called **grandpa.bmp** in the **Legacy\Reunion\Pictures** folder is currently being used somewhere in your file. (You should be careful not to have different picture files with the same name located in different folders. It will surely confuse you at some point...

Assigned Pictures

Below the **Picture Filename** list is the **Assigned Pictures** list. It shows a list of all the events for the currently highlighted person and any pictures that have been assigned to those events. You can view the pictures from this list by first clicking the **Assigned** tab in the upper-right corner of the window, and then clicking on the desired picture name in the list. The complete filename for the highlighted picture, including the folder where it is stored, is displayed along the bottom of the window.

Previewing the Pictures

The Picture List Tab

When the **Picture List** tab is selected, you can preview the pictures that are highlighted in the **Picture Filename** list to the left. When a picture is displayed, there are several options available:

Zoom opens a *QuickLook* window showing a larger view of the current picture. This window can be stretched to the full size of your monitor if desired. Click the **X** in the upper-right corner to close the *QuickLook* window.

Rename allows you to change the name of the currently highlighted file in the *Picture Filename* list. The file is then renamed on disk. If the file has a **+** in the **U**

column, any links to this picture within your family file are also renamed to match the change you made.

Delete erases the currently highlighted picture file in the *Picture Filename* list. After confirmation, Legacy erases the file from the current folder. If any links to this file exist in your family file, they are removed. (If the picture is linked to anyone in a different family file, deleting the file will cause a “picture file not found” error when trying to access it from there.)

Caption, Date, Description, User File Number displays a window where you can enter caption, date, and description information before assigning a picture to an individual. There is also a field for a User File # if you are assigning these numbers to your pictures. These entries are remembered by Legacy for future use even if the picture has not yet been assigned to anyone.

The Assigned Tab

Clicking on the **Assigned** tab lets you view pictures that have already been linked to the current individual.

Zoom (Same as **Zoom** on the **Picture List** tab.)

Rename (Same as **Rename** on the **Picture List** tab.)

Remove unlinks the currently highlighted picture in the *Assigned Pictures* list from the current event in the list. It does not delete the file from the disk.

Caption, Date, Description, User File Number allows you to view and edit the caption, date, description, and user file number entries for the current picture.

Set Preferred lets you change the preferred picture setting for any event that has more than one picture assigned to it. (The preferred picture is the one that prints on reports.)

Changing the Order lets you change the picture order by using the up and down Order arrow buttons. Highlight the filename you want to move and click the appropriate arrow to change its position up or down. You can also move a picture from one event to another using these buttons. If a filename is at the bottom of the event section, clicking the **down** arrow moves the picture down to the first position in the next event. The **up** arrow moves a picture to previous events in the same manner.

Attach

Clicking **Attach** links the highlighted current picture in the **Picture Filename** list to the highlighted current individual in the **Name** list under the event that is highlighted

in the **Assigned Pictures** list. The caption, date, description, and user file number from the **Picture List** tab go along with the assignment.

► **To assign a picture to more than one individual, for example to each person in a family reunion photo:**

1. Highlight the desired picture in the **Picture Filename** list.
2. In the **Picture List** tab, fill in the caption, date, description, and user file number as desired.
3. In the **Assigned Pictures** list, highlight the event where you want to place the picture.
4. Click **Assign**.
5. Highlight the next person.
6. Click **Assign** again.
7. Repeat steps 5 and 6 until the picture has been assigned to the desired group. (You can change the caption, date, and description fields between each attachment if needed, for instance, to say “Martha is the first person on the left” in Martha’s description and “Ted is the second person from the left” in Ted’s description, and so on.)

Zoom

The **Zoom** button to the right of the **Attach** button is used to select the font size used in the various lists of the screen.

Close

To close the *Picture Center*, click **Close**. All captions, date, descriptions, and user file numbers that you filled in while in the center are remembered and will appear the next time you open the center.

Searching for People

How to Locate Individuals and Families

Overview of Searching

Legacy includes powerful search capabilities. You can find anyone in the family file using any type of information. This includes names, dates, locations, and notes, as well as information in many other fields. You can look for field contents that *begin* with certain text or field contents that contain a word or phrase anywhere in that field. You can also create groups of information through the search option, such as a list of all people who were born in London, England, or a list of all people who died of cancer. Once a search group is found, you can quickly move from person to person, viewing or editing. Search groups are even remembered between sessions.

The search feature can be reached by either choosing **Find** from the **Search** tab of the

Ribbon bar, or by clicking the **Search**  button on the **My Toolbar** tab of the **Ribbon** bar. The *Search* window contains six tabs, **Query by Example**, **Detailed Search**, **Miscellaneous Searches**, **Missing Sources**, **Missing Information**, and **Census List**.

Query by Example Tab

Query by Example is an easy fill-in-the-blanks type of search.

► To query for information:

1. Fill in one or more fields with the information you want to find.
2. Select **Male**, **Female**, or **Either**.
3. Select one of the **How to Find** options. **Exact** looks for only what you typed (searching for a last name of Roberts will find only Roberts, not Robertson). **Starts With** finds records where the information *starts* with what you typed (searching for a given name of “B” will find all names that begin with B). **Anywhere in field** looks for what you typed at any position within the field (searching for “abe” would find Abe, Abel, Mabel, Faber, etc).
4. Click **Find First** to look for the first matching record, or **Create List** to generate a *Name List* of all the records that match the search criteria.

If you clicked **Find First**, the record is immediately shown in the *Family View* or *Pedigree View*. If you clicked **Create List**, you can display any of the resulting records by highlighting a name and clicking **Select**, or by double-clicking a name. With the record displayed, you can display the next record by clicking **F3**, or the previous record by clicking **Shift-F3**.

More Detail

If you click **More Detail**, the *How to Find* box disappears and a set of option buttons appears next to each field on the search screen. These are labeled *Equal*, *Starts*, and *In*. This lets you specify the type of search you want to perform for each field, instead of all the fields as a whole. For example, you could search for records with a last name equal to “Jones” and given names starting with “A.”

Detailed Search Tab

The *Detailed Search* tab allows you to search for individuals using much stricter criteria. You can use AND and OR modifiers to look for specific types of individuals in specific places.

Who to Look For

Select the type of person you want to find. You can search for a male, a female, an individual (who can either be a male or female), or a marriage.

Where to Look

Select the field you want to look in.

What you are allowed to enter into the **What to Look For** field is controlled by the field selected in the **Where to Look** field to the left. Depending on what you selected, the **What to Look For** field may be empty, in which case you will have to type in the needed criteria, or the field will contain preset options to choose from.

How to Look

You can search by using Equal To, Not Equal To, Before, After, Contains, Starts With, Sounds Like, and Wildcard. (Some types of searches do not include all these search methods.) None of the searches are case sensitive; uppercase and lowercase letters always match.

Equal To finds whatever you enter, matched letter-for-letter.

Not Equal To matches will be found for everything except what you enter.

Before and After is used for finding dates.

Greater Than or Equal to matches anything from a given number and higher.

Less Than or Equal to matches anything from a given number and lower.

Contains looks through the entire field contents to see if what you typed is found anywhere within it.

Starts With matches field contents that begin with what you entered.

Sounds Like finds surnames that sound like the name you entered. Everything is converted to standard Soundex codes before comparing.



(Help index: **Soundex**)

Wildcard provides pattern matching, like **Dav*** (Dave, Davis, Davidson, Davenport, etc.) or **Berd?n** (Berdan, Berden, Berdin, Berdon, Berdun).



(Help index: **Wildcard search**)

What to Look For

Type in the information you want to find, or select the item from the drop-down list box.

Adding Search Criteria

You can specify up to three different conditions to search for. To enable the next condition, select **Second Condition** then **Third Condition**, choose **AND** or **OR**, and fill in the search fields.

Using AND and OR

If you select the AND option for a search condition, both of the search comparisons must be true in order for the individual to be selected. For example:

Male, Last Name, Equal To, Johnson
AND
Male, Age, Greater Than, 50

displays all individuals who are male, with a last name of Johnson, and were born more than 50 years ago.

When you select the OR option, only one or the other (or both) of the search comparisons need be true to select the individual. For example:

Individual, Title, Equal To, Duke
OR
Individual, Title, Equal To, Duchess

will display all individuals, either male or female, who have either a title of Duke or Duchess.

If you use three search conditions, any search conditions using AND are done before any using OR. If the final result is true, the individual is displayed.

Here are some examples of single and combined search conditions:

True	Displayed
False	Not Displayed
True AND True	Displayed
True AND False	Not Displayed
True OR True	Displayed
True OR False	Displayed
False OR True	Displayed
False OR False	Not Displayed
True AND True AND True	Displayed
True AND True AND False	Not Displayed
True AND True OR False	Displayed
False OR True AND True	Displayed
False OR True AND False	Not Displayed
False OR False OR True	Displayed

Starting the Search

After specifying a search criteria using one of the three search methods, you can either display the individuals found one at a time or in a list format.

One at a Time

To display the records one at a time, click **Find First**. Legacy finds the first person matching the search criteria and displays that individual on the screen in the current *Family View* or *Pedigree View*. You can then press **F3** to move to the next person matching the search criteria. **Shift+F3** moves backward through the group.

Creating a Search List

To create a list containing all the individuals who match the search criteria, click **Create List**. If you are creating a list, you can either begin a new list, add to an existing list, or search a previously created search result group.


Clear List before this search clears any existing search list before doing the current search. The resulting search list will contain only the people from the current search.

Add results to existing Search List retains any previous search list and adds the current search results to it. This way you can combine two or more subsets of people into one list.

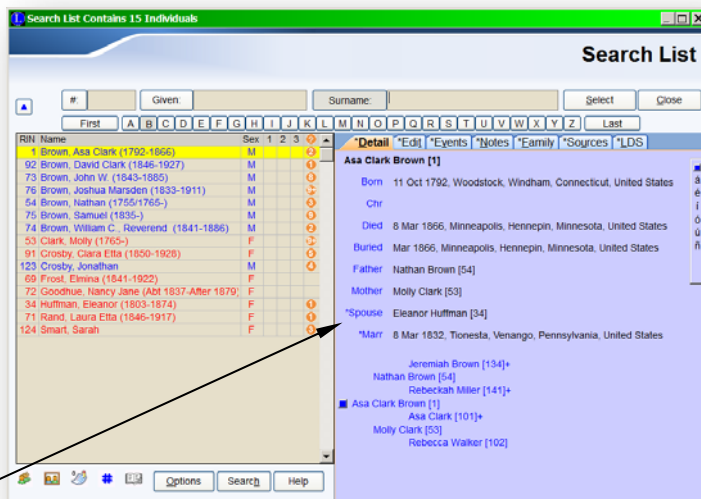
Only search the Search List causes Legacy to restrict its search to the existing search list. For example, if the previous search list contains all the people born in Boston and you are now searching for all people who died of cancer, the result will be all the people who were born in Boston and died of cancer.

Search List Window

The *Search List* window is the same window that appears from the *Name List* command. Through this window any person in the Legacy family file can be quickly and easily found. When the *Search List* has been created through a search command, it can be

closed and called up again later by clicking on the **Search List**  icon (Deluxe Edition only) on the toolbar or by choosing **View Search List** under the *Search* menu.

Notice that the details for each individual in the name list are shown on the right side of the screen. This data changes as each individual is selected. The field name titles such as Born, Chr., Death, etc., can be changed by clicking on a line label and selecting from the list of available options.



Once a *Search List* has been created, additional individuals can be found and added to the list by selecting the **Add results to existing List** option on the *Search* window, before clicking **Create List**. The search results remain active and available until they are replaced by another search. You can even quit Legacy, come back later, and use the old search list. It is automatically saved.

Miscellaneous Searches Tab

The following searches are also available:

Searches Dealing With the Current Individual

Focus Group finds all the members of the current focus group. (See *Focus Groups* on page 211 for more information on setting up these groups.)

Oldest Direct-Line Generation finds all the individuals who are in the oldest ancestor generation. This could be one person or many. For example, if the ancestors go back 10 generations and there are five individuals in that 10th generation, those five will be found. If it goes back 11 generations and there is only one person, that individual will be the only person found.

Youngest Direct-Line Generation finds all the individuals who are in the youngest descendant generation.

Direct-Line Ancestors With no Parents finds all the ancestors of the current individual who have no mother and father linked to them. In other words, the ends of all the ancestor lines.

Direct-Line Descendants With no Children finds all the descendants of the current individual who do not have any children. In other words, the ends of all the descendant lines.

Searches Dealing with the Entire Family File

Linked Individuals With no Children finds all individuals who are linked to either a spouse or a parent, but have no children linked to them.

Linked Individuals With no Parents finds all individuals who are linked to either a spouse or a child, but have no parent linked to them.

Unlinked Individuals finds all individuals who are not linked to anyone.

All Records With an Individual Tag # of x finds all the records that have been tagged with the specified tag number.

All Records With Bad Dates finds all individuals who have an unrecognized date anywhere in their information. (This can happen because of ignored warnings when editing and importing.)

Individuals who are Married finds all the people who have one or more spouses linked to them.

Individuals With an Unknown Spouse finds all the people with some marriage information but no actual spouse linked to them.

Individuals With Multiple Spouses finds all the people who have two or more spouses linked to them.

Individuals With Multiple Parents finds all the people who have two or more parents linked to them.

Missing Sources Search

You can search for individuals who are missing a source citation on various pieces of information that has been entered. This will give you a list that you can use to go back and figure out where the information came from.

Select the checkboxes for the items to search on. You can select as many as you want to. In the **How to combine the selected fields** box in the lower-right corner you can indicate how to handle multiple selections. Either **ALL of the selected fields must be missing information for a match** or **Only ONE or more of the selected fields must be missing information for a match**.

When you have selected the desired field and set the combine option, select one of the options below to begin the search:

Missing Information Search

You can search for individuals who are missing various pieces of information. This will give you a list that you can use to go back and try to fill in the blanks.

Select the checkboxes for the items to search on. You can select as many as you want to. In the **How to combine the selected fields** box in the lower-right corner you can indicate how to handle multiple selections. Either **ALL of the selected fields must be missing information for a match** or **Only ONE or more of the selected fields must be missing information for a match**.

When you have selected the desired field and set the combine option, select one of the options below to begin the search:

Census List

Inspired by the release of the 1940 U.S. Census, the Create a List of Potential Individuals feature was added to Legacy to help generate a list of people who can probably be found in a particular census for a particular location.

The Census List screen is reached by clicking the **Search** icon on the main view or the **Search** icon on the *Name List* and then clicking on the **Census List** tab. You can also choose **Find...** from the **Search** menu. Another convenient way to reach the *Census List*

screen is to click on the **Census** button on the main toolbar. (If the **Census List** button is not included on your toolbar, you can add it by right-clicking on any tool in the main toolbar to bring up the *Customize Main Toolbar* screen and then dragging the **Census** button up to the **Main Toolbar** from the **Available Toolbar Buttons** list.

Generating a Search List or printing a Census List report is done in three steps:

1) Choose a Country:

The **Country** combo box can be used to automatically fill in the **Place** field below it with the country you want to select. The combo box contains a list of many countries that have census information available. When you select a country, it is filled into the **Place** field for you. (Legacy uses whatever is in the **Place** field when doing the search, not what is in the **Country** combo box. The combo box is just a convenient way to fill in the **Place** field.)

If you want to manually enter a location, you can type it directly into the **Place** field. You might want to do this if you are interested in a country that is not in the combo box. For example, **Albania**, or **Madagascar**. You can also include state names in the **Place** field. For example, **Maine, United States** or **British Columbia, Canada**. For the best results, you should always spell out fully each part of the location in the **Place** field. Use **Maine, United States** instead of **ME, US**, use **British Columbia, Canada** instead of **BC, Can**.

You can even enter a city name as part of the location. When doing this be sure to enter the rest of the location, such as **Las Vegas, Nevada, United States** or **London, England**. You should not enter the county portion of a location unless you really want to filter your list down to include only locations that include the county name.

Remember, it is the entry in the **Place** field that is used when creating the **Potential List**, not the country that is showing in the **Country** drop down list. The drop down list is only used to help you fill in the **Place** field.

2) Choose the census year

The **Date** combo box contains the years of all the available censuses for the country that is selected in the **Country** combo box. When you select a year from the combo box, the actual census date (if known) is automatically filled into the **Date field**. (Legacy uses whatever is in the **Date field** when doing the search, not what is in the **Date** drop down list. The combo box is just a way to help you fill in the **Date field**.)

You can also skip using the **Date** drop down list and just manually enter a date into the **Date** field. It can be just a year or a full single date. Do not enter date ranges or modifiers like, **About, From, Before, After**, etc.. Legacy won't know what to do with these.

Average Life Span - If a birth or christening date can't be found, the life span entry is used to estimate when a person was born by subtracting the value from the death or burial date. Or, if there is no death information, the death can be estimated by adding the life span value to the birth or christening date. The average life span you select should be tempered by the census date time period. Here is a partial list from Wikipedia:

Classical Greece and Rome: 28
Pre-Columbian North America: 25-30
Medieval Islamic Caliphate: 35+
Medieval Britain: 30
Early Modern Britain: 25-40
Early 20th Century: 31
Current world average: 67.2 (2010 est.)

Age Filter - If you want to limit the results to individuals of a certain age or age range, select this option and fill in the lower and upper ages of the range.

Gender Filter - You can limit the results to either Male or Female by selecting this option and setting the gender desired.

Search List Options Tab

The options on the **Search List Options** tab apply only to creating a search list.

Exclude individuals from the Search List who appear to have already been found in this census - Legacy looks in several places to see if the current census has already been referenced for a particular person. These include event names and descriptions, individual and event source citations, and individual notes. If the current census is mentioned in any of these places, you can have the person excluded from the search list.

Exclude individuals from the Search List with location percentages less than X % - Each location Legacy finds is given an estimated location percentage dependent upon the location's date and how close it was to the census date. Locations with low percentages can be excluded from the search list by selecting a percentage value as the minimum acceptable.

Report Options Tab

When generating the report, there are several options that can be selected. (These options do not apply when creating a search list):

Include married names for wives - Married names for wives will be included under the maiden names. This is important because married individuals are shown using their married names on a census list.

Include alternate names - Alternate spellings and nicknames will be included under the main names. These too are often given to census takers.

Include surrounding relatives - The parents, spouses, and children of each main individual are listed below the main individual's name so you will have an idea of who else to be looking for on a census list.

Italicize individuals who appear to have already been found in this census - If the census has already been used for a particular person, his or her name is printed in italics. (If this option is selected, the option to **Exclude individuals who appear to have already been found in this census** is automatically turned off.)

Exclude individuals from the Report who appear to have already been found in this census - Legacy looks in several places to see if the current census has already been referenced for a particular person. These include event names and descriptions, individual and event source citations, and individual notes. If the current census is mentioned in any of these places, you can have the person excluded from the census report.

Exclude individuals from the Report with location percentages less than X % - Each location Legacy finds is given an estimated location percentage dependent upon the location's date and how close it was to the census date. Locations with low percentages can be excluded from the census report by selecting a percentage value as the minimum acceptable.

Include calculated dates (underlined) - If a person is missing birth or death date information, the Average Life Span value is used to approximate the missing date. If this occurs, the calculated date is shown with a leading "Cal:" and is underlined.

Horizontal lines between rows - Includes a horizontal line at the top of each person's information block. This makes it easier to see where each person begins.

Include RINs & MRINs - Includes the record ID numbers at the end of names.

Color Text and Boxes - (Deluxe Edition only) Three different color options are available when printing the Census List report. These include coloring the names on the report with either **Ancestor Colors**, **Gender Colors**, a color of your choice, (or no coloring at all). To select the desired coloring option, click the **Color Text and Boxes** button and make your choice. See **Custom Box Colors** for more information.

Page Setup

Click the **Page Setup** button to change page margins, print orientation, paper size, heading and page numbering options, and footer options. See **Page Setup** for more information.

Font Size

Click the **Change Fonts** button to select a different font or font size for the report. See **Report Fonts** for more information.

3) Create the List or Report

You can either generate a **Search List** or print a pre-designed **Census List Report**.

Search List

The **Search List** for the potential individuals is just like any other search list created by Legacy. It results in a name list containing only the matching individuals. To generate a search list, click the **Create a Search List** button. See **Something Else to Consider** below for other options when creating a search list.

Census List Report

Clicking the **Print a Census List Report** button generates a pre-designed report showing each matching individual with their name, birth and death dates, the age they were at the census date, and the probable location that qualifies them for the list. An estimated match percentage is also shown as an indication of how likely it is that the person will be found at that location. The further away the location date is from the census date, the lower the percentage. Also, if there are non-qualifying locations between the matching location and the census date, the percentage goes down. For example, if a person has a Residence event with a qualifying location followed by one or more Residence or other events with non-qualifying locations, the estimated match percentage goes down substantially.

Note: Before clicking the **Print a Census List Report** button, look at the **Search List Creation Options** in the **Something Else to Consider** section below.

Something Else to Consider

Stepping Through Records One at a Time

If you want to step through all the records one at a time, click **Find First** in the lower-left corner of the *Search* screen. Legacy will find the first person matching the search criteria and display that individual in the current Family or Pedigree view. You can then press **F3** to move to the next person matching the search. **Shift-F3** moves backwards through the group.

Search List Creation Options

In the lower-left corner of the *Search* screen there are three options that will control who ends up in the resulting search list or report:

Clear List before this search: This option clears any existing search list before doing the current search. The resulting search list will only contain the people from the current search.

Add results to existing List: Any previous search list is kept and the current search results are added to it. This way you can combine two or more subsets of people into one list.

Only search the Search List: This option causes Legacy to restrict its search to the existing search list. For example, if the previous search list contains all the people who were Male, the resulting Census List will only include people who were living in the specified place on the specified Date - **who were Male**. This is a very powerful option.

Search the Internet

The Internet is a great place to search for your family members. Billions of people are documented in thousand and thousands of genealogical sites across the World Wide Web. From Legacy you can search the Internet for information about people in your family file. This is often a good way to extend your family lines and find other living relatives working on the same things.

To start a search on the Internet, choose **Search Internet** from the **Search** tab of the **Ribbon** bar.

There are many, many places on the Internet where you can search for information about your ancestors. Legacy comes preloaded with eight sites to begin your searching. Any number of additional sites can be added at any time.

The *Search the Internet* screen, has several fields that are preloaded with information concerning the current individual. Below the fields is a list of up to eight Internet search sites where you can look for additional information and about this person and their surrounding family. Each Internet site requires some or all of the information shown in the top half of the screen. The fields that are not needed for the currently selected site are disabled (grayed out). The remaining “live” fields can be changed before initiating the search. As you select different search sites, the appropriate fields are made available.

► **To start an Internet search:**

1. Click on the desired search site.
2. Make sure the information in the fields reflects the person you are looking for.
3. Click **Search**.

If you would like the *Search the Internet* window to remain displayed after you search for a person, make sure the **Close this window after each search** option is cleared. Selecting this option will cause the window to close when a search is done.

To customize the list of eight Internet search sites, click **Customize Searches**. (This is a *Deluxe Edition* only feature.) The *Customize Internet Searches* window appears with the eight currently selected sites showing. You can then change any of the sites to something different.

When you are done searching, click **Close**.

Customize Internet Searches

The *Customize Internet Searches* window is reached by clicking **Customize Searches** on the *Search the Internet* window.

To add or change one of the eight Internet search sites, click **Select** to the left of the site you want to change. The *Select an Internet Search* screen appears where you can choose a site to search, or add a new one. (See *Select an Internet Search* below for more information.)

To reset the current list of eight site to the defaults that came with Legacy, click **Defaults**.

When you have a group of searches set up the way you like them, you can save them for future use. Any number of search sets can be saved and reloaded at any time. To save a search set, click **Save** and then specify the name and location where you would like them saved. To reload a set, click **Load** and specify the set you would like to pull in.

Select an Internet Search

The *Select an Internet Search* screen is reached by clicking one of the **Select** buttons on the *Customize Internet Searches* screen.

Legacy comes with several Internet search sites ready for you to use. The Available Internet Searches list includes these and any others you have defined. As you highlight each line, the search string is displayed below the list. The character sequence that is used to replace a space in the search string is also displayed. (Internet search strings do not have any blank spaces in them. So, to pass information that contains a space, like a givenname-middlename combination (John Francis), the space is replaced by one or more other characters. These are usually a plus sign (+) or the hexadecimal version of the character like %20.)

To select a site from the list, highlight the desired line and then click **Select**.

To make changes to an entry in the list, highlight the entry and then click **Edit**. The *Create Custom Internet Search* screen appears where you can make any needed changes.

To add a new Internet search to the list, click **Add**. The *Create Custom Internet Search* screen appears where you can enter the search string to be used.

You can also delete any search entries you no longer want to keep in the list. To do this, highlight the line you want to remove and then click **Delete**.

Creating Custom Internet Searches

The *Create Custom Internet Search* screen is reached by clicking **Add** or **Edit** on the *Select an Internet Search* screen.

This screen is used to add a new Internet search string or to edit an existing string.



(Help index: **Define:Internet Search**)

Search and Replace

Search and Replace helps you globally search through your entire family file to make changes. You can search for and replace the contents of Given Names, Surnames, Titles, Alternate Names, Notes, Dates, Lists, Sources, Multimedia, Addresses, Events, Repositories, To-Do items, and more. Over 100 fields can be changed.

► **To use Search and Replace:**



1. From the **Search** tab of the **Ribbon** bar, choose **Search Replace**.
2. From the **Find Where** list, select the field in which you want to perform the search and replace.
3. In the **Find What** field, fill in the contents you want to search for.
4. In the **Replacement Text** field, enter the text you want to change it to.
5. Under **How to Find** and **How to Replace**, set any desired options.
6. Click **Start**.

When Legacy finds the first matching search text, the *Replacement* screen is displayed. If you want to make the replacement, click **Replace**. Click **Skip** if you would like to move on to the next match. If you are confident that you want to automatically make the change on all the remaining matches, click **Replace All**.

Web Page Creation

How to Create Web Pages for the Internet

Publishing your genealogy on the Internet can be a highly effective way of sharing information with others. Legacy's comprehensive *Web Page Creation* utility generates five styles of Web pages including Ancestor Book, Descendant Book, Pedigree, Family Group, and Individual. All styles are easy to navigate and each includes a table of contents, name index, customizable content, and extensively cross-linked pages.

Legacy also allows custom HTML codes to be embedded by advanced users who want to add buttons and other features. Web pages can include links to other sites and downloadable GEDCOM files.

Planning a Web Page

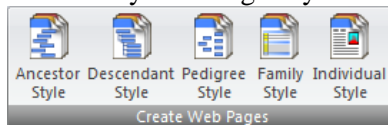
Before you begin creating your own web site, take some time to plan it. There are three basic things to determine before you can begin:

- Where and how will you upload your pages to the Internet? Contact your Internet service provider (ISP) for details.
- Decide on a Web page style that best presents your genealogical information on the Internet.
- Decide whom you want to include (and exclude) in the web pages.

Creating a Web Page

► To make a Web page:

1. From the **Internet** tab of the **Ribbon** bar, choose the style of Web page you want to create by selecting a style from the **Create Web Pages** section.



You can choose from: **Ancestor**, **Descendant**, **Pedigree**, **Family Group**, or **Individual**.

2. Select the options you want to use from the ten tabs (described below).
3. Click **Create Web Pages**.

Web Page Options

There are many options that can be used when exporting a Legacy file. These include where to generate the web pages, contents, and index, who to include, what to include, formatting, suppressing of information for living individuals, privacy issues, what graphics to use, pictures to use, and many others. See the help topic for complete information on all of the options.



(Help index: ***Web page creation***)


Legacy FamilySearch


How to Synchronize with FamilySearch Family Tree

Legacy FamilySearch

Legacy is fully integrated with the FamilySearch family tree website provided by the Family History department of the Church of Jesus Christ of Latter-day Saints. It is one of the most heavily visited genealogy sites on the Internet. Millions of people use FamilySearch resources to learn about their family history. FamilySearch access is free.

The FamilySearch integration feature in Legacy can be turned on or off. This setting is reached by choosing **Customize** from the **Options** tab of the **Ribbon** bar and then going to the **General** section. The **Integrate with FamilySearch** option is near the bottom of the section.

When FamilySearch integration is turned on, small icons  appear at the end of the names on the *Family* and *Pedigree Views* to show if that person's information is synchronized with the information in FamilySearch. These icons change to indicate the status of synchronization and temple work completion.

The FamilySearch search icon  on the **My Toolbar** tab of the **Ribbon** bar can also be used to open the FamilySearch screen with the current person in your family file as the focus person.

A complete, up-to-date description of the synchronization process with family tree is available in the online help system of Legacy:



(Help index: **FamilySearch, Overview**)

Miscellaneous Tools and Utilities

Handy Utilities to Make Life Easier

File ID Number Assistant

Many users create a filing system for the documents they collect during their research. Filing numbers are part of this system and are used to organize the documents. File number fields are available on Master Source documents, source citation documents, To-Do items and Pictures. The File ID Number Assistant is used to help you figure out what the next available ID number is for any of the different categories. If you are using a system of filing numbers that contains letters and numbers and you need to be reminded of the next available increment of the number portion, the Assistant can help. The

Assistant is reached by clicking the  button to the right of any **File ID** field.



(Help index: **File ID Number Assistant**)

File Maintenance

File maintenance in Legacy (reached by clicking the **File Maintenance** button on the **File** tab of the ribbon bar) consists of four options: Check/Repair Family File, Master Lists Cleanup, Compact Family File, and Set File Sorting Order. These options do some checking to make sure the integrity of your family file is correct.

Check/Repair

The solution to many family file problems can be found by performing the **Check/Repair** option in **File Maintenance**. This option rebuilds indexes, performs over 100 integrity checks of all information, and repairs errors that it finds. Anything that appears to be wrong is reported to you.



(Help index: **Check and Repair Family File**)

Master Lists Cleanup

Remove Abandoned Information You can have unused entries removed from any or all of the master lists maintained by Legacy. For example, abandoned entries can happen in the *Surname List* if you were to delete all the people with a certain surname from the family file. That surname would still remain in the master list as an

unreferenced name. You can have Legacy run through the *Surname List* to remove any names that are not being pointed to. This is most often the case if you entered a misspelled name and then later corrected it. “Smih” could end up in the list, taking up room, and never be referenced.



(Help index: ***Master Lists Cleanup***)

Compact Family File

When individuals are deleted from the family file, all references to them are removed, but the record is still taking up space in the file. To remove the unused records, select this option. Legacy goes through the file and deletes all records that are not referenced, making your family file smaller.

Set File Sorting Order

The sorting order of a family file determines the order that the various letters of the alphabet are displayed in lists and on reports. You can choose from the following sorting orders:

1. English, French, German, Portuguese, Italian, and Modern Spanish
2. Dutch
3. Norwegian and Danish
4. Spanish
5. Swedish and Finnish

When you change the sorting order of a family file, all the internal indexes must be rebuilt. (Since this is a change to the family file, it is a good idea to make a backup before proceeding.) Depending on the size of your family file and the speed of your computer, this operation may take a while.



(Help index: ***Set File Sorting Order***)

Backing Up Your Family File

Making regular backup copies of your family file information is essential, yet is often taken for granted or ignored by many. Backups are a fundamental part of using a computer. If you don't make backups, there will come a day that you *will* be sorry.



(Help index: ***Backing Up a Family File***)

Deleting a Family File

If you want to erase a family file, choose **Delete File** from the **File** tab of the **Ribbon** bar. After confirming your intention, Legacy deletes the currently opened family file.

Setting Direct-Line Preferences

As you move from younger generations to older ones in both the *Family View* and the *Pedigree View*, Legacy automatically chooses the *preferred* parents of the current individual. (You can change the *preferred* parents, if there is more than one set, by right-clicking on an individual and choosing **View / Parents List**.) As you move back down to younger generations, you will oftentimes get “lost” because you can’t remember which child to select.

You can have Legacy automatically reset all the direct-line ancestors of a specified individual to *preferred*. This way, as you navigate up and down through the generations, you can find your way back down the same way as you went up.



(Help index: **Direct Line**)

Testing Picture and Sound Locations

When you import information from a GEDCOM file that contains references to picture, sound, and other files, Legacy needs to know where they are located on the new computer. Most of the time, when you receive a GEDCOM file from another person, it is not accompanied by the multimedia files. To reconcile the file links, have Legacy search for them.



(Help index: **Checking Multimedia Locations**)

Clearing Import Tags

Whenever you import records into your family file, Legacy marks them as “Imported.” You can see if a record was imported by popping up the *Last Modified* window by clicking on the **Modified Date** box at the right end of the status bar at the bottom of the main window. If you want to clear all the “Imported” marks, choose **Other Tools > Clear Imported Tags** from the **Tools** tab of the **Ribbon** bar.

Trees in This Family File

What Are Trees?

A tree is a group of individuals who are all linked together in some way. Ideally, there should be only one tree in a family file. But, in the process of deleting or unlinking

individuals, unintentional trees of unlinked lines or individuals may result in a family file. Or, you may add unlinked individuals or groups, hoping to find where they fit into your family in the future. To find the various trees in a family file, use the **Tree** utility in Legacy.



(Help index: **Counting Trees**)

Global Sorting

Children, Marriages, and Events

The *Sort Children, Marriages, and Events* screen is reached by clicking the **Other Tools** button on the **Tools** tab of the **Ribbon** bar and then choosing **Sort Children, Marriage, and Event Lists** from the submenu.

By default, Legacy tries to place new children, marriages, and events into chronological order as you enter them. If what you are entering has a date, Legacy will do its best to place the item into the correct position - otherwise it will be placed at the end of the list. If you know where the item really goes, you can manually move it into position.

You may have a group of children where some have birth dates and others do not. Sometimes you know what order a child should be placed even though you don't know the date. "William and Mary's second child was Martha..." In Legacy you can manually move that child into whatever position you want to. If you blindly sort the birth order later, all the children with the blank dates will be moved to the top. "Nothing" sorts before "Something."

Sorting things that might or might not have a date is a bit tricky and you need to understand the rules Legacy follows when doing this.

- If all the items in a group have a date associated with them, Legacy will sort the group into chronological order with the earliest date at the top.
- If some items have dates and others do not, Legacy will sort the items (children or marriages or events) with no dates to the top of the list. This will often be incorrect. There is an option to not sort a particular list if there is one or more blank date in the group.

Place a checkmark on the groups of items that you want to sort. If you don't want to sort groups with one or more missing dates, select the sub-option for that group that will tell Legacy to skip those lists.

When you are ready, click **Sort the Selected Lists**.

What's New in Version 9.0

The Best Just Keeps Getting Better

Legacy Family Tree 9.0 adds the following features:

Hinting (Standard Edition)

Legacy 9 sifts through billions of records from key websites – MyHeritage, FindMyPast, FamilySearch, and GenealogyBank – for new information, pictures, and stories of your ancestors. As you add to your tree, Legacy 9 begins the search – automatically!

Hint Results

Helen Brown
(Click on a Hint to see the details...)

	GenealogyBank Last searched: 11/9/2016 Found: Total: 1
	FindMyPast Last searched: 11/11/2016 Found: Total: 8
	MyHeritage Last searched: 11/10/2016 Found: Total: 30, Pending: 30, Confirmed: 0 Adds: child(ren) Improves: death date
	FamilySearch Total: 6, Pending: 0, Confirmed: 1

Close
Help
Edit Person

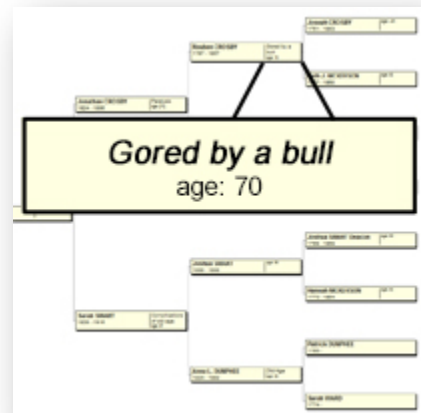
Show these Hints for this person:

- FamilySearch
- FindMyPast
- GenealogyBank
- MyHeritage
- Research Guidance

Reports and Charts

See trends in your ancestors' medical history with the new **Cause of Death** charts. (Deluxe Edition Only)

Expand your genetic genealogy tools with the new **X-DNA color schemes**. (Deluxe Edition Only)



Get everyone involved at your next reunion or family gathering with **Family Tree BINGO** – play with cards of your ancestors, descendants, or a mixture. (Deluxe Edition)

You can also now see your tree at a glance in the **Family Dictionary**. (Standard Edition)

Online Backup (Standard Edition)

You'll never worry about losing your data again. In addition to backing up to your hard drive, a thumb drive, or a DVD, you can now backup your Legacy to the Legacy Cloud. It also makes transferring to a new computer a breeze.

FindAGrave.com Searching (Deluxe Edition Only)

One-click access to your ancestor's Find A Grave memorial. Create a list of people in your tree with or without Find A Grave IDs.

Stories (Deluxe Edition Only)

Preserve the stories of your ancestors or stories of your own. The new Stories tool lets you record, organize and print multiple stories for any of your ancestors.



Global Sorting of Media Lists

You can now have Legacy go through your entire family file and sort all the media you have added to individuals, marriages, and events. There is an option to skip the sorting of particular lists where there are one or more media files with a blank date which would force them to the top. The same is available for sorting all the children for each marriage.

Automatic Sorting While Adding

As you add or edit media items (pictures, sounds, videos, documents, and website URLs), they are automatically placed in chronological date order. This saves you lots of time. (This automatic sorting is optional and can be set separately for adding or editing. The settings can be changed in section 2.2 on the Data Entry Customize screen.)

New QuickHelp Videos

Many of the screens in Legacy now include QuickHelp videos you can watch to quickly see how all the options work.

And dozens of other enhancements

Digital pictures are now auto-sorted by date. View all 9 tags in the Name List. Support for data entry and reporting of same gender relationships. Direct import from the now-retired *Master Genealogist* software. Two additional custom toolbar buttons, and much more . . .

Tips and Tricks

All the Cool Things that Makes Legacy So Good!

The Fun Stuff

Legacy is a very full-featured program that has lots of little features and convenience options that may not be obvious when you first start using it. Some of these may even escape your detection completely although most are documented somewhere in the Legacy Help system. Although these features are not essential to the successful operation of the program, you will find that they greatly enhance your effectiveness and efficiency and make for a very enjoyable experience while you work.



(Help index: ***Tips and Tricks***)

You might want to reread this help section from time to time as you become more familiar with Legacy. Each time you do, you are likely to pick up and remember new capabilities that you never knew were there.

Another great resource is to go to the **Tips from the Experts** in the **Support** box of the **Legacy Home** tab.

Legacy 9 Software Support

Our technical support staff can answer questions only about Legacy. Questions about Microsoft Windows, family history programs made by other companies, or genealogical research in general cannot be answered. For help with Windows, please consult your Windows user guide. For help with genealogical research, contact your local library, genealogical society, or historical society.

Technical Support

If you are a registered user of the Deluxe Edition of Legacy 9, you can get free technical support and notification of product upgrades.

There are many ways to get answers to your questions using Legacy 9 be it software support or how-to questions. Below is a list...

1. Read the Legacy 9 manual as there are screenshots and helpful hints. Search the Index in the back of the manual to see if the subject is listed.
2. Have you seen the Legacy 9 training videos created by Geoff Rasmussen?
3. Try watching the “Legacy for Beginners” video as it is a 45-minute-long video that covers the basics of starting a family file in Legacy. It can be watched by choosing it on the Legacy 9 installation CD or from within Legacy and an internet connection and then choose HELP at the top and then choose “Beginners Video.”
4. Try the Help Index from within Legacy. When you run into a problem or have a question while using Legacy, click Help and then choose “Help Index Icon” or press F1. The help system is context-sensitive and tries to answer questions about the current task. Type in a keyword in the top left area and then hit the Enter key on your keyboard for a list of help subjects that you can click on to read.
5. If your program is locked up, frozen or not working right, try quitting the program and rebooting the computer. Sometimes Windows just needs a fresh start.
6. Have you visited our Webinar website? If not, we have hundreds of webinars that cover many subjects. You can subscribe monthly or yearly at a very low cost. If you are not a member we still have many free webinar videos to watch. You can reach the website by going directly from your Internet browser and enter the website address which is <http://familytreewebinars.com>.
7. Try visiting our huge Knowledge Base (KB) website that has hundreds of helpful support topics. Many have screenshots and instructions that you can print out. From

- within Legacy just click on Help and then choose “Tech Support.” Once there you can type in keywords or an error number in the top right area of the screen and then choose from the list below. This KB is updated often and we are adding new subjects when we see the need. The direct website link is <http://support.legacyfamilytree.com>. Or from within Legacy choose Help at the top and then choose “Tech Support”.
8. You can now join our new “Legacy User Group” Facebook page and ask fellow Legacy users your question. This is a very active group and we have thousands of Legacy users eager to share their Legacy knowledge. The support team often drops in with helpful hints and or ideas. Just log into your Facebook account and then at the top where you see “Search Facebook” enter “Legacy User Group” to join this closed group. The direct website is <https://www.facebook.com/groups/LegacyUserGroup/>
 9. You can create a support ticket from within Legacy 9 by choosing Help at the top and then choose the “Support Ticket Icon” be sure and fill out as much information that you can as this will help us when we email you back.
 10. If you would like to email us directly please include your name, deluxe customer number, email address, the version of Legacy you have installed along with your question or problem. Our email address is support@legacyfamilytree.com.

Millennia’s Web Site

Visit our World Wide Web home page for exciting information on Legacy and other related products. We also have many links to other sites that contain more information on compiling your family history.

Our home page address is:

<http://www.LegacyFamilyTree.com>

Our online store address is:

<http://legacy.familytreewebinars.com/>

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