

Legacy for Beginners

by Geoff Rasmussen

If your genealogy information is currently in a different genealogy computer program, you do not have to re-type it all into Legacy. Legacy can import the information, provided that the other program can convert it to a compatible format. If the other program can create a GEDCOM file, then Legacy will import it. GEDCOM is an acronym for Genealogical Data Communications – it is a file format created to assist in transferring data from one genealogy computer program to another.

For instructions on creating a GEDCOM from other software, see the software's instructions.

After you create the GEDCOM, now you need to import it into Legacy. Follow these steps:

1. Click on the File tab. Click on Import from. Click on Use Import Wizard to help with any import.
2. Select **A different program (via GEDCOM)** and click Next Step
3. Follow the remaining steps by answering the questions, and clicking Next Step.

Your family file is now ready to use.

Starting from Scratch

If your genealogy information is not already in another genealogy computer program, you can start fresh by using Legacy. After installing Legacy, click on the Create New Family File button, and follow the steps.

Begin by adding yourself, and your immediate family members. This is simple if you can remember to use the Add menu. Just click on the Add menu, and select either Husband or Wife. It does not matter at this point if you are not a husband or a wife, this really just assigns the correct gender. Then click on Add a NEW person. Now fill in what you know about yourself in the given, surname, born, and christening fields. Hopefully you will not have to fill out the died or buried fields yet for yourself. When you are done, click on the Save button. To add other family members, simply use the Add menu.

How many family files should you manage?

At some point, users of any genealogy computer program, including Legacy Family Tree, will ask the question, "Should I split my database?"

The reasons given for wanting to split a database are many:

- you may want to keep your spouse's genealogy in a separate database
- you may want a separate database for each line you're working on
- you may want to share just a portion of your database with another relative/researcher
- you feel that splitting your database would make more room in your main database

Before making the plunge and splitting your database, consider these cautions:

Intermarriages

Suppose you separated your genealogy from your spouse's, and they are now in two separate family files. As your research progresses, you get further and further back in time. You begin researching a family that seems all too familiar - maybe you've researched it before. In fact, you had previously researched it - on your spouse's side.

The further back you trace, the chances are higher that you and your spouse have common ancestry. Such is the case with my wife and me. Back in the 1580s, we share a common ancestor - Stephen Hopkins is my 12th great-grandfather. He is also my wife's 12th great-grandfather. If I had split my database so that my wife's database was not included in mine, I may not have picked up on the fact that we were 13th cousins. I may have even duplicated our research.

This is one of the reasons why I keep all my genealogy in the same database.

Duplication of data entry

When I first started my research, I had eight separate databases. One for each of my eight great-grandparents. I thought it'd be easier to research this way. The descendants of these great-grandparents number into the thousands. In fact, because I am a descendant of each of these great-grandparents, I entered myself into each database.

The challenge this presented was that every time I needed to update my information, or I became a new dad, or even if I needed to update information on any of my cousins, I had to update the same information in at least two of the databases. If I needed to update my personal information, I would have to update it in all eight. Chances are greater that I would make a typo in at least one of them.

Printing

If my database were separated from my wife's, printing a pedigree chart or other reports becomes challenging. For example, I could not print cascading pedigree charts beginning with my son, Evan, because on the first chart, only his paternal side of the family would appear. If all my genealogy were combined into one family file, this would not be a problem.

But won't it get too big?

We have "test databases" of Legacy where we've linked over a million individuals. There are two potential challenges when working with databases of this magnitude. First, navigation becomes a bit slower. Second, the size of the database is considerably larger than one of just a few thousand. However, we haven't run into too many researchers that claim to have researched a million individuals - I'd love to see their documentation....

It's still okay...

There may still be good reason to split your database. I've created a separate research database to help me in tracking all the different Alanson Browns. Once I have positively identified my Alanson Brown, using Legacy's split screen tool, I can drag and drop him and his family into my personal database.

I've also created a separate database where I indexed the tax lists of Washington County, Tennessee from 1778-1850. Now doesn't that sound like an exciting way to spend a weekend?

Before you go ahead and make your split, carefully consider the above implications.

The Essentials: Names

In genealogy we want to accurately record the names of each individual. Names have four parts:

1. Title – prefix
2. Given name
3. Last name or Surname
4. Title – suffix

Many given names and surnames are interchangeable. Alexander may be a given name or a surname. The same is true for names such as Taylor, Thomas, and Martin.

Most genealogists were taught to always record the surname or last name in UPPERCASE to avoid confusion between the given name and last name. Technology and software have evolved, so this rule is no longer necessary. However, Legacy has several options for displaying surnames:

Show /Surnames/ within slashes

John /Smith/

Show SURNAMES in upper-case letters

John SMITH

Show /SURNAMES/ within slashes and upper-case letters

John /SMITH/

Show Surnames as entered

John Smith

You also have the same four options for printing surnames when you print a report.

As an example, you could:

- | | |
|--|--------------------|
| 1. Enter the names in mixed-case | John Henry Smith |
| 2. Display the surnames within slashes | John Henry /Smith/ |
| 3. Print the surname in upper-case letters | John Henry SMITH |

When entering the last name of a female name, always use her maiden name.

Title – prefix. Titles such as Reverend, Dr., Sir and Colonel are not part of the given name for an individual. You will not find them on birth/baptismal records, but they may be very helpful in tracing your ancestors and should be recorded as a name title-prefix.

Title – suffix. Titles such as Jr., Sr. may be part of the individual's name but post nominal letters such as PhD, MD, and DDS are not. However, both should be recorded as name title-suffix.

Nicknames, other spellings, and aliases. When searching databases online, browsing indexes in books, or performing original research, we may not find what we are looking for, simply because we have not searched for all known variations of the name.

While researching Asa Frederick GOAS, I have found these variations of his names:

- Fredrick GOAS
- Asa GOAZ
- Frederick GOAZ
- Frederick GOES
- Frederick GOEZ
- Frederick GOOZ
- Frederick GOZ

I also found a land record for John McCALL. In the same document, his surname was spelled 4 different ways:

- John McCALL
- John McCAUL
- John McCAL
- John McCALE

When doing your research, it is vitally important to search for all variations. If you record these variations in Legacy's Alternate Names section, these names can optionally be printed on reports. Follow these simple steps:

- From either the Family View or the Individual's Information screen, click on the Alternate Names icon
- To add a new name, click on the Add button. Enter the name, click Save, then add its source.

Include Alternate Names in Reports

When printing reports, be sure to turn on the option to include these alternate names. Follow these simple steps:

1. Click on the Reports button and select the desired report.

2. Click on the Report Options button.
3. On the Include tab, check the Alternate given and surnames option.
4. Close. Preview.

Below is a portion of the Family Group Record. At the top is the list of alternate names. With this information included in the report, we are more likely to remember to search for these alternate names.

| Family Group Record for Asa Frederick Goas | |
|---|---|
| Husband | Asa Frederick Goas ^{7, 8} |
| AKA | Frederick Goas, ¹ Asa Goaz, ² Frederick Goaz, ³ Frederick Goes, ⁴ Frederick Goaz, ⁵ F Goz ⁶ |
| Born | Between 1830 and 1831, Beaver County, Pennsylvania ^{1, 3, 7, 9} |
| Christened | |
| Died | 23 Jan 1893, Lafayette, Tippecanoe, Indiana ¹⁰ |

Show Alternate Names in Index View and Name List

The alternate names can also be included in the Index View and Name List (deluxe edition only). In the Index View:

1. Click on the Options button in the upper right
2. Select Include AKAs in List

In the Name List:

1. Click on the Options button at the bottom
2. Select Include Alternate Names

The alternate name will be preceded with a ~. The magic of including these names in these lists is that you don't have to remember the "correct" spelling of the name. Once you locate any of the alternate names, they all point to the same person.

The Essentials: Dates

Legacy supports six different date formats:

- Nov 21, 1953
- 21 Nov 1953
- 11-21-1953
- 21-11-1953
- 1953 Nov 21
- 1953-11-21

Separators for numeric dates can be: dash (-), slash (/), blank (), period (.)

1. Dash (-) 11-21-1953
2. Slash (/) 11/21/1953

3. Blank () 11 21 1953
4. Period (.) 11.21.1953

The recommended date format for North American researchers is:

Day-Month-Year (30 Nov 1953)

The recommended date is good for writing genealogical queries that will be published or submitted online and for exchanging information with other people.

The European format for writing dates is day-month-year, so April 1, 1970 is written in numeric format as 1/4/1970. One genealogist may interpret this as April 1, 1970 and another might interpret this as January 4, 1970. Using the day-month-year format with the month abbreviated or spelled out will avoid misinterpretation by the reader.

Other dates

- abt = About
- bef = Before
- cir = Circa
- aft = After
- bet = Between
- cal = Calculated

At Options > Customize > Dates tab > Prefixes you can adjust the abbreviations to anything you want.

For example, if you type A, Abt, or About, the prefix would be displayed as **abt**.

Legacy is very powerful – but are you using it to its full potential? This lecture will discuss the “little” things in your software which make a big difference.

| Step | Instructions |
|-----------------------------------|---|
| 1. Relationships | Tools > Set Relationships and Tools > Relationship Calculator |
| 2. Bookmarks | Bookmarks icon; Ctrl+S (go to startup person); Quick-Bookmarks |
| 3. Direct Line | Can indicate in cascading FGRs with an X; direct line is highlighted in lists |
| 4. ½ relationships | Right-click on child > View > Show ½ kids; Chronology View. |
| 5. Symbols | + § ! |
| 6. Set the initial Startup family | Options > Set Preferred Startup Family |
| 7. Preferences | Options > Customize OR Ctrl+Z |
| 8. Create Backups | File > Backup File |
| 9. Potential Problems | Reports icon > Books/Other > Potential Problems |
| 10. File Maintenance | File > File Maintenance |
| 11. Tree Finder | View > Tree Finder |
| 12. Customize toolbar | Click on the customize button on My Toolbar |

1. Relationships

Being able to visually understand how the currently-highlighted individual is related to you can be important. For example, when you clicked on Jeremiah COLE, if your relationships were set, it could tell you that he is your ½ 3rd great-uncle, 3 times removed. The relationships are not automatically displayed. You need to set the option. Then, as you add new individuals to your database, the new relationships will automatically be calculated and displayed.

2. Bookmarks

Bookmarks are shortcuts to navigating to a person. Each program has the ability to quickly navigate to the “home” person. Additional bookmarks can be set. These additional bookmarks can be useful when you are researching a few different families at once. Just set a bookmark on each person, and you can very quickly navigate to them.

3. Direct Line

When printing cascading family group records, it is often helpful to know which of the children is part of the direct line. The program will mark the direct line child with an X or bold the person.

4. ½ Relationships

Just like today's families, your ancestral family may have had ½ siblings growing up together. Being able to easily view the "complete" family is helpful in the analysis of your research. Arranging the families into a chronology/timeline is one way to study the complete family. Progeny's *Charting Companion* software (www.progenysoftware.com) will combine multiple family group records into one report. Legacy will create a timeline from the data you have already entered.

5. Symbols

Understanding the little symbols on the screen can save you time:

has descendants or ancestors; child is married, but has no descendants; never married

6. Set the Initial Startup Family

There is nothing more frustrating than opening your software, only to view your 19th cousin, 4 times removed – every time. Setting the initial startup family allows you to select which person you want to have displayed when you start the software. You can either select a certain person to appear each time, or you can select to view the last person you were working with.

7. Preferences

Each program has different preferences that can be set – which colors to display, LDS options, surnames in ALL CAPS, formatting of dates, displaying RINs. To learn about all the different preferences, select one, and see what it does. Preferences will not "touch" your data. But it is still always a good idea to make a backup before playing with options with which you are not comfortable.

8. Create Backups

Creating a backup of your database isn't really that important – that's what we think until we lose everything! In addition to backing up to a floppy disk or hard drive, consider these other alternatives:

- Backup to a USB/jump/flash drive, CD, DVD, external hard drive
- Create a backup/GEDCOM and send (email) it to all your family members. Even if they don't have any interest in genealogy, they at least have a backup for you, off-site, in case anything happens.
- Publish your GEDCOM to an Internet site. Rootsweb's WorldConnect is free. You can remove it or update it at any time.
- Offsite backups: Mozy.com, Backblaze.com, etc.

9. Potential Problems

This tool will search your database for potential problems caused by typos, or mis-interpretation of records. It can warn you if a child was born before the parents were married, if the person was married before the age of 12, if the child was born after the mother died, etc. Legacy allows you to ignore individual problems from the potential problems report.

10. File Maintenance

Sometimes the database can develop problems that have nothing to do with the information you have typed. These problems may occur if your computer was turned off before the software was closed, and power failure, etc. Always make a backup before performing file maintenance.

11. Tree Finder

For one reason or another, intentionally or not, you may have “floating” individuals in your database that are not linked to your main family lines. The tree finder tools will search for these unlinked individuals. You can then confirm these separate trees, or link them where they should be linked.

12. Customize Toolbar

The toolbar has icons which represent the most commonly-used features in the software.