Advanced Legacy Family Tree

Presented by Cathy Amen

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Legacy Family Tree, Version 9.0; Website: https://legacyfamilytree.com
Standard Edition is free; Deluxe edition is $34.95, includes PDF User's Guide

Recommended Actions To Do Periodically

1. Set Relationships
2. Run Potential Problems List
3. Run Media Relinker Report
4. Do File/Maintenance Actions
    a. Check/Repair Family File
    b. Compact Family File
5. Run Tree Finder
6. Run Merge Report

Legacy Source Clipboard

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. Optionally, each source clipboard can hold up to five different citations which can all be pasted at once.

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.

You can set or change the master source citations by clicking the **Step 1** link in the header area, **Click here to select or change the master source to cite**. 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. This reflects your confidence in the accuracy of the 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, uncheck the **Include this Citation on Reports** box. To include the actual source text in citations printed on reports, check the **Add this Text to the Source Citation on Reports** box on the **Text/Comments** tab. If you want to be prompted for the Source Detail each time you use the clipboard, check the **Prompt for Detail** box 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. The option is set 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 **OK** 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:

On the *Individual's Information* window, enter the information for James Michael Martin Sr.
When you have finished, but before you click **Save,** set up the *Source Clipboard* with the source information. Click the **Source Clipboard**  button.
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 mastersource to cite** to bring up the *Master Source List* window.
Click **Add** to display the *Add a New Master Source* window.
Choose the source template to use and then click **Go to Step 2**
Enter the source information into the template fields.
Save the master source and **Select** it for use in the *Source Clipboard*.
In the *Detail Information* section, fill in the details fields. (If there is more than one source on the clipboard, fill in the detail fields for all the sources.)
Set the surety level to reflect your confidence in the accuracy of this information.
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:

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.

Or, you can click  to have Legacy automatically assign the source to every field on the *Information* form that is not blank. (This also includes all events in the event list.)

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 or set of citations, you can save it (or them) to disk for use in the future. Up to ten different citation sets can be saved. To save a citation set, click the **Save Citations to Disk...** button 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 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 Source Clipboard

If you have saved one or more *Source Clipboards*, you can quickly load them back in by clicking the **Load Citations from Disk...** button. 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

There is another quicker way to load clipboards that have been saved. On any screen with a *Source Clipboard* button, , right-clicking the button displays a shortcut menu containing the names of all saved clipboards. You can then simply click the citation you want and it is instantly loaded and ready to use.

Note: You can also Quick Copy a source citation from any individual, loading it into the *Source Clipboard*. See **Quick Copy Existing Citations to the Source Clipboard** on the Citing the Sources of Your Information topic for instructions.

Shortcut Keys for the Source Clipboard

There are shortcut keys available when assigning source citations from the *Source Clipboard*.

Alt-1 Opens the source clipboard. (Same as clicking)
Alt-2 Assigns to the current field. (Same as clicking)
Alt-3 Assigns to all non-blank fields. (Same as clicking)
Alt-4 Assigns to the Unspecified area. (Same as clicking)

Legacy Tip of the Day on DNA (from Facebook Legacy User Group)

Michele Simmons Lewis
March 12, 2019 ·

Legacy Tip of the Day (Legacy Staff) - DNA! I love DNA

I have posted a few times about how I have DNA stuff set up in Legacy. I thought I would pull all of the info into one post.

CAVEAT - This is the way I do it. There is no right or wrong way. You may already have a system that works great for you. I just wanted to give you a few ideas.

Background: I work on my paternal and my maternal side separately because there is no overlap between these two lines. I use my paternal uncle's DNA to work on my paternal side. I use my mother's DNA to work on my maternal side. I do very little with my mother's side because she is German (born there) and all of her ancestral lines have been in central Europe since at least the 1600s (thank you parish records!) All of her matches are 30 cM or less except for two who won't answer back so...

I have over 200 DNA testers entered into my file. Most are confirmed matches and they are linked into my tree but I have a few unlinked ones because I know it won't be long before I will be able to link them. These are all paternal matches.

I have Hashtags linking the testers together by Most Recent Common Ancestor (MRCA). LGS are my uncle's initials. I went ahead and added his initials in case I ever managed to find a MRCA for my mother.

LGS MRCA - Albert & Mary (Grantham) Graham
LGS MRCA - Archibald & Sarah (Brown) Graham
LGS MRCA - Daniel & Sarah (Slade) Grantham
LGS MRCA - Lewis & Lucy (Austin) Grantham

If the person has more than one MRCA to my uncle they get more than one Hashtag (common in this family)

I also have the following DNA events...

https://www.facebook.com/groups/LegacyUserGroup/permalink/1010894355768363

Legacy Tip of the Day on DNA (from Facebook Legacy User Group)

GEDmatch
DNA Painter
AncestryDNA
FTDNA Family Finder
FTDNA yDNA
MyHeritage
23andMe
LivingDNA

I move these events to the top of their real event lists. They only get the events that apply to them.

In the event I put the person's kit number (if applicable) and their AKA on that particular site. I use the notes to record any correspondence when I have messaged/emailed them for more info or if I have asked them to upload to GEDmatch. I date each entry so I know when the last time I asked them was. These notes will be identical to the notes I have entered on the websites themselves (for those that allow notes). And I DO use the notes fields on the websites!

I also use DNA to-dos because I like having reminders.

I add contact info to these people via their main Address icon. I add their email address and a URL link to their online tree, if they have one.

Every DNA tester in my file is tagged on Tag 9.

If I have asked for a GEDmatch upload (and I ask every single tester I come in contact with) then they are on Tag 8. I untag them from 8 if they upload to GEDmatch.

Tag 7 is for people that I have not painted to DNA Painter because they are related to me in more than one way. I work with these one at a time because I have to paint each segment separately. The more DNA I already have painted the easier this will become. I have one tester that is related to my uncle (and me) in 6 different ways! Not looking forward to that one.

Tag 6 is for people that I have not painted to DNA Painter because they have tested with Ancestry and haven't uploaded to GEDmatch yet. Ancestry does not have a chromosome browser so I can't paint them until I get them on GEDmatch.

I hope this gives you some ideas 🙂

https://www.facebook.com/groups/LegacyUserGroup/permalink/1010894355768363

Using Legacy to Track DNA Matches and Correspondence
by
Cathy Pinner, July 2019

The reason most of us are collecting and sorting out the DNA matches is to verify our tree and get clues for brickwalls.
One of the things you soon discover with DNA results is that you are flooded with data.
How do you manage it?
Can you quickly list all known DNA matches from a particular ancestor or ancestor couple or do you have to go searching?
What information do you want to record?
If you've transferred results to other sites, do you remember which site you found a particular useful match?
Do you know who you've contacted and whether they've responded?

Although I have a number of spreadsheets, I'm not a spreadsheet person and I'm not about to keep them updated especially since I tend to begin them with an import of some kind.
I tried using Evernote but discovered I wasn't keeping it updated though I still keep research suggestions etc there.
I discovered DNA Painter and it's an enormous help for sorting and analysing matches and adding notes. For me it works far better than a spreadsheet and the various filtering options it has means it can look like a complete mess or be really simple. If for some reason I want a spreadsheet, I can export from DNA Painter to a spreadsheet format.
BUT I decided it wasn't a good place to keep track of correspondence and besides when I'd worked out a connection I need that information in Legacy.
Adding notes on sites like Ancestry and MyHeritage is important and Ancestry's new grouping system is great.
Messaging is useful but the search on Ancestry in Messages is abysmal and as far as I can see MyHeritage messages don't have a search.
Ancestry has flagged that searching messages is about to be improved. They already have a Messaged Filter in DNA Matches but I think it only captures Messages initiated from the DNA Match page by you certainly I've exchanged messages with other DNA matches and at least 2 that initiated the conversation aren't in the filtered list.
Ancestry has a Filter for DNA matches with Notes but you can't search the Notes. There were some browser extensions that enabled that but I'm not sure which ones work with the new format.
MyHeritage doesn't have a way to either filter for matches with notes or to search notes.

So it's back to Legacy to sort out the mess of data.

This is what I've now found works for me. I've refined it over time so not everyone in my file is updated and I'm working on that.

I use a lot of Legacy features as listed below. I've only added some How to for some of them which may be less familiar.

1. ADD AN INDIVIDUAL WITH SIGNIFICANT DNA MATCH TO LEGACY EVEN IF JUST AS AN UNLINKED INDIVIDUAL

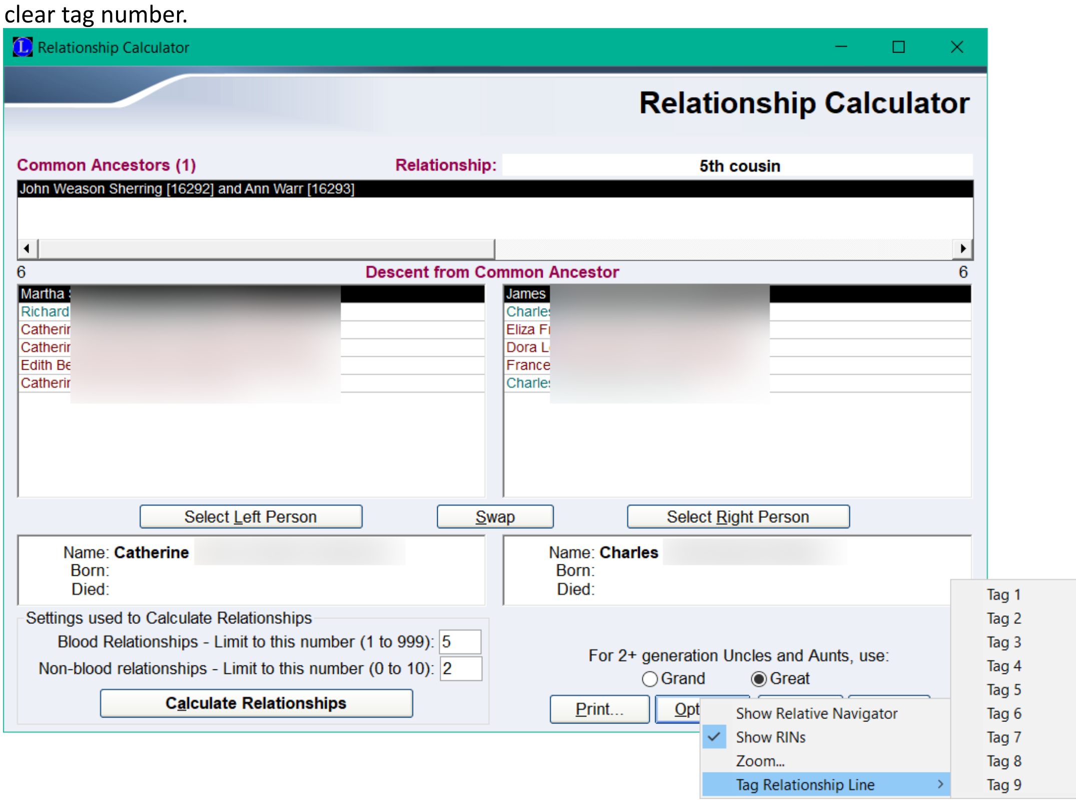
Why? It provides a base for putting other information.
What is significant?
You could say a match over a particular shared amount of DNA and I add people definitely if they match above 50-60 cM
But I also add much lower matches if there is a ThruLine or Theory of Family Relativity for them or a suggestive link via Shared Matches and their tree. Exception: I don't add normally if they have an extensive tree going way back on all lines in the USA. I don't know enough about researching early American families so if they can't jump the pond, I ignore them. You'll develop your own exceptions.
Other significant matches are ones you can connect to your existing tree with or without the help of Thrulines or Theories of Family Relativity.

Use the username
If you don't know the testers name, just enter their username in the Given Name field

Adding connecting matches when you can see you have their grandparents or great-grandparents but the connecting people are private.
Add a Placeholder person for the parent and grandparent. If I can see the gender of the linking parent I put that and otherwise put unknown gender. Given Name: Placeholder (then you can find them all and review whether you now know their real name) Surname: blank if I can't see what it probably is.
Sourcing
When I add data in Legacy, if I'm not sourcing properly immediately (and when you're speculating in a Q & D tree (Quick & Dirty as advocated by Blaine Bettinger and others] you probably don't want to stop) I use a Quick Tree Master source (Basic Style) and drop copied and pasted transcriptions and references into the Source Detail or Source Detail Text. Then I know where to look when I've found the connection and want to source the line properly.

2. HASHTAG

Hashtags help you to keep track of people. I use many. I hashtag with DNA-Test to indicate a test taker then with a specific hashtag for each site their DNA data is on.
I also add a Hashtag for the MRCA (Most Recent Common Ancestor) if known to the line between us found and tagged with the Relationship Calculator.
How?
1. In Advanced Tagging check which tag numbers are not being used and note the number of one clear tag. You can right click on a tag box to open Advanced Tagging and see how many are using each tag from the list where you also enter why the tag is being used.
2. You may want to go to Tools - Set Relationships and reset relationships to yourself. This needs to be done regularly after adding people or merging or deleting people so that the Relationships stay up to date.
3. Highlight the Test Taker.
4. Go to Tools - Relationship in the Calculator section
5. If the relationships were up to date you will be on the left side and the test taker on the right, if not you may have to search for the person you are wanting to compare to.
6. When the relationship has been calculated, check whether there are multiple relationships as, if so, you'll need to highlight the one for the line you want to tag.
7. Click Options button on the Relationship Calculator and then Tag Relationship Line and choose your clear tag number.



8. Close out of the Relationship Calculator
9. Open the Name List (one way is View - Name List)
10. Click the Search button on the Name List and choose Show all Tagged - the number you've used.
11. You are now looking at the line you have tagged.
12. Click the Options button and choose Add Hashtag to everyone in the List.
13. Highlight the relevant Hashtag on the Select Hashtag screen that opens or click Add to add a new hashtag
14. Click the Assign button.
Now everyone on that relationship line will have the hashtag you just assigned.

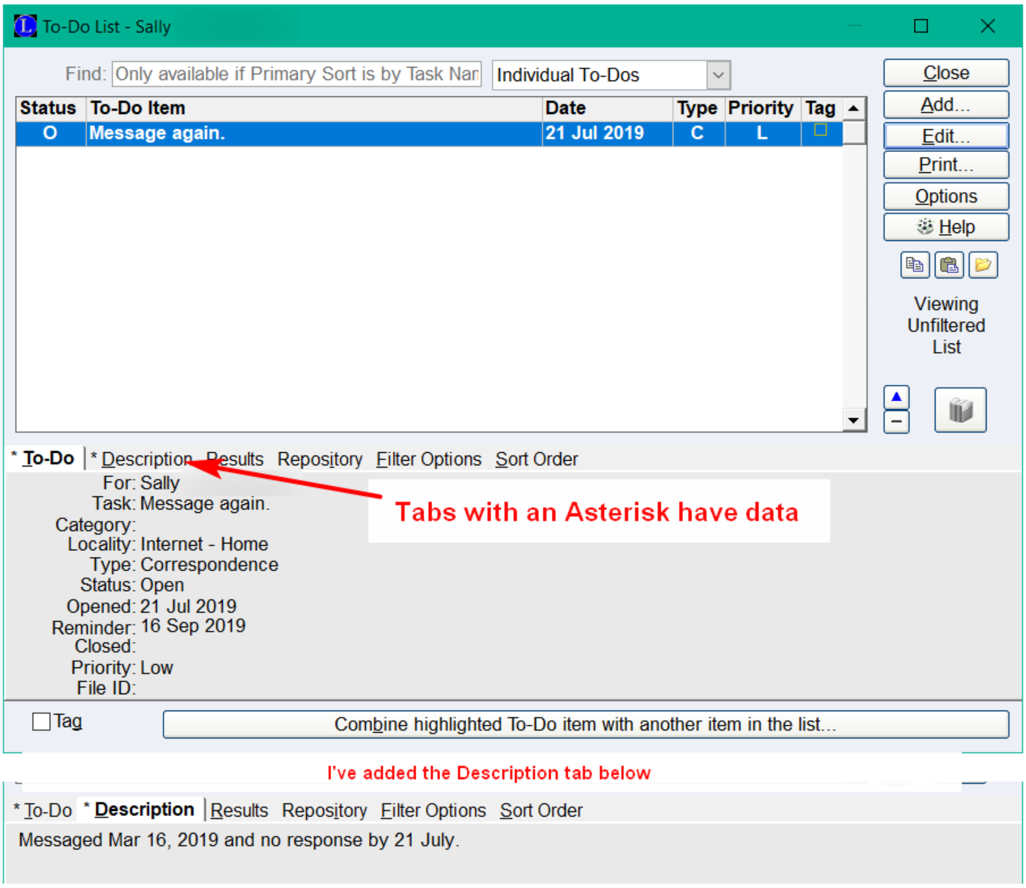
Note the Hashtags are useful for searches as well as just quick information. Example below.

3 ADD A DNA MATCH EVENT

I use the Description Field to note the MRCA for, if unknown, the possible line or simply Unknown. I turn off the Date and Place fields for this Event.
This is where you can keep notes on the match. Whether this is structured or not is up to you.
I put the site in bold and add their username on each site. I generally add the amount of cM the match is.
I add the names of significant Shared Matches if this seems helpful.
I have access to several DNA kits. If the match is to me I don't specify but if to sibling or cousin I do. If the match is only to cousin(s) or sibling(s) I'm beginning to add another Hashtag rather than another Event.
I make this Event Globally Private. This isn't an Event I want to share with others. It's easy enough to include in a report for myself if desired by changing the Privacy setting either for the Event or by overriding Private Master Events when generating the report.

4. ADD TO-DOS TO KEEP TRACK OF NEEDED RESEARCH OR CORRESPONDENCE

Note you can set a Type for To-Dos. R for Research, C for Correspondence, O for other. This aids filtering the list for the relevant To-Dos
When setting a To-Do there is a Locality field. I use this for where I need to be to do the research whether that's at home or a particular library or a particular country. That locality may or may not also be a Repository. For DNA Match To-Dos my locality is Internet-Home. I reserve Home for To-Dos that relate to physical papers etc at home.
The more you enter into a To-Do, the more useful it is as a log of research or correspondence or both.
Example of a brief To-Do



Filtering your To-Do List

For the To-Do list to be useful you have to understand the various tabs and options for sorting and filtering them.

You can see All To-Dos at once by going to View > To Do List > All To-Dos
The First tab at the bottom of the list shows you the details of the highlighted To-Do.
Note my list isn't very helpful if it's showing all To-Dos for everyone. There are over 3600 of them.
The tabs Description, Results and Repository may not be useful - it depends on whether you filled in that field in the highlighted To-Do. Repository isn't always relevant.

Filter Options Tab

Note it has an Apply button AND a Checkbox on whether to apply the current filter when the list is opened. This is the type of checkbox you are likely to check and then wonder what happened to your data so if you decide to use it, remember you checked it.

The Filter has lots of options.

If you don't get the results you expect, check them all again.
When preparing I thought I'd first just show you how to limit to Open To-Dos. I was a little startled to see that I only seemed to have 5 open To-Dos. What had I done? I'd also put a Locality = blank filter on. I never intend to enter a To-Do without a Locality so these need to be edited.

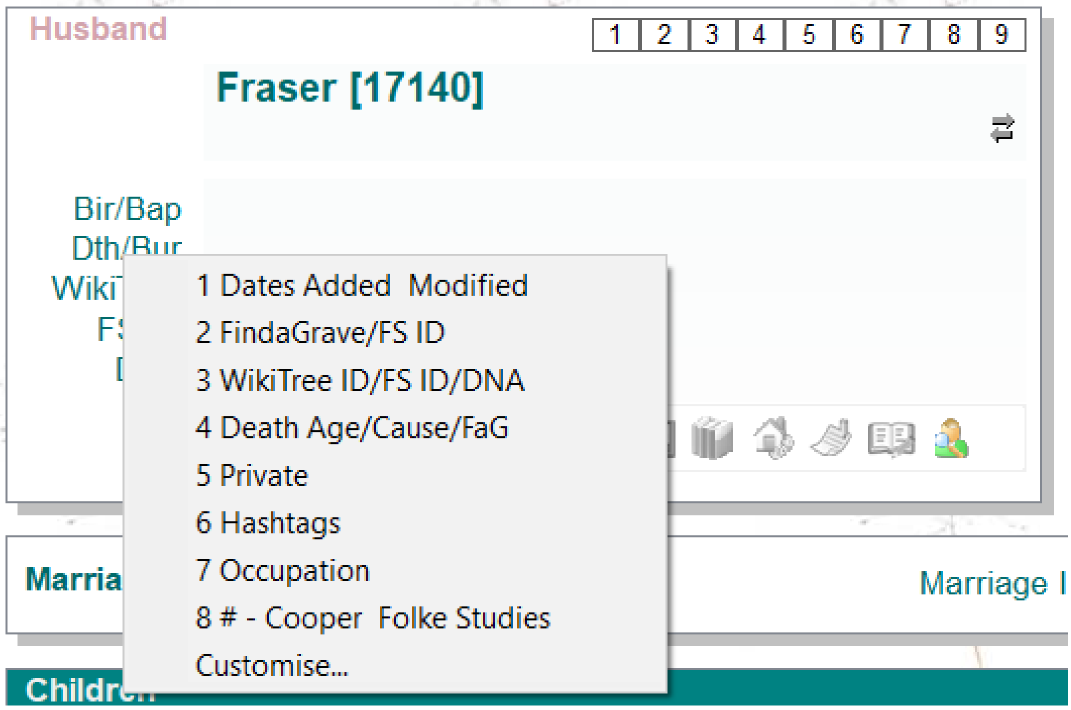
If you want your list on paper or a PDF rather than on screen in Legacy, you can use the To-Do Report from Reports >Other Reports > To-Do Report or just click the Print button when in the To-Do list.

5. ADD NAME SUFFIXES AND AKAS FOR THE USERNAME(S)

I put them in Privacy brackets [[what is in here is private]] so they don't have to be removed later.
Again I experimented with this and I'm only just standardising. I've found I need it in both. If I've been looking at matches at a website, I need to be able to find that person in Legacy by their username on the website. If I'm in Legacy and want to check their Shared Matches etc on the website, I need their username to find them on the website and it's there on the screen if it's in the Suffix.

6. SAVE CUSTOMISED FAMILY VIEW LABELS AND INDEX VIEW AND DESCENDANT VIEW COLUMNS THAT INCLUDE SELECTED HASHTAGS

To do this it's useful to start all your hashtags with a code so that it's easy to select a group of hashtags.
You may want more than one column. eg one for the DNA-Test and the hashtags related to which site they're on. Another for the MRCA hashtags.
How?
You can customise Family View Labels by clicking on a label and choosing Customise. Once you have saved sets of labels, they will show on this list so it takes seconds to change the set you are using by clicking on one of the saved options. You can save up to 10 sets.



On Descendant View and Index View you can Customise the Columns and save up to 10 sets of columns.
Click on the Options button on those views and then Customise to choose and arrange your columns.
Right click on the Header row to change to another set.

7. ADD EMAIL ADDRESS IF KNOWN TO THEIR INDIVIDUAL MAILING ADDRESS

This is accessed from the house icon under their name in Family View and on their Individual Information screen.
I add the date when the email was current in the webpage box which I rarely otherwise use.

8. CHECK PRIVACY SETTINGS.

Depending on how you share your Legacy data, you may want to make DNA testers, particularly those who are distant cousins, Invisible as well as their parents. Or it may be enough for you to leave out the living when creating gedcoms for online trees or reports for distant relatives.

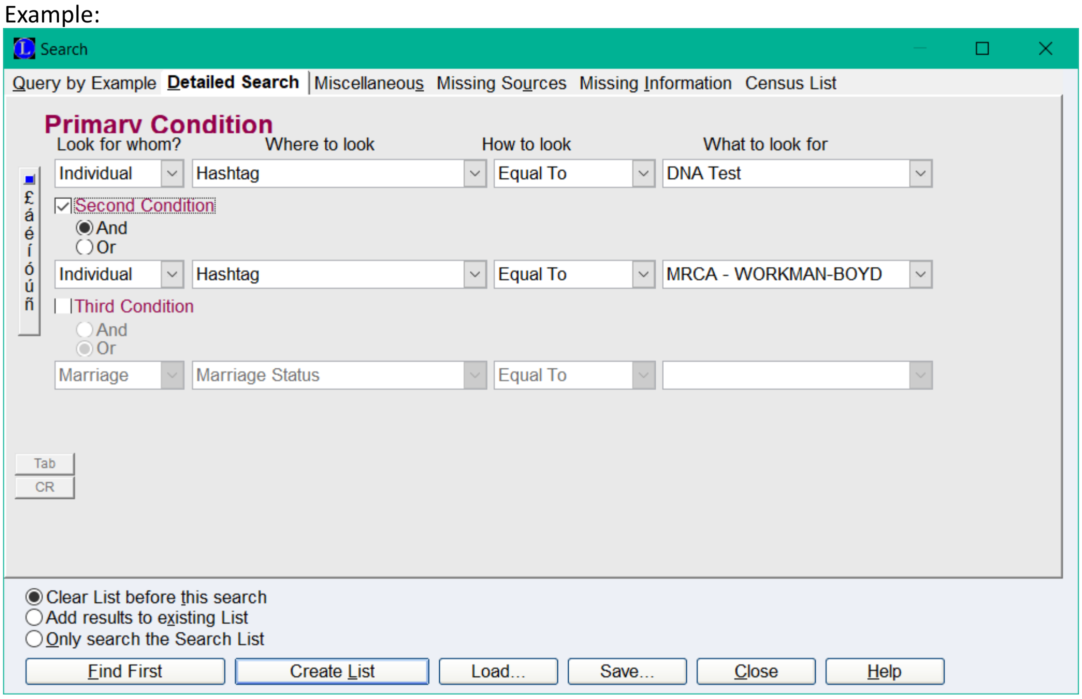
9. ADD NOTES AND LINKS TO KEEP TRACK OF DNA RELATED DATA IN OTHER PLACES

It's your choice whether you add it to the DNA Match Event or a To-Do or elsewhere.

Evernote
If during my investigations I've dropped stuff into Evernote, then I add the link in Legacy. I'm still exploring whether I prefer to put the Sharing Link or the Internal Link. They both work. They both open in your browser. If it's the Internal Link you have access there to all your other notes. If it's the Sharing Link you don't but I think it opens faster and you have it to send a meaningful link to someone else.
Online Trees
copy the URL of useful trees you find and drop them into the Quick Tree Source or the DNA match Event or a To-Do
It's when doing a quick tree for a DNA match that online trees are very useful. Of course you need to do a check for basic credibility but you can leave the full check for later.
I have a Q & D private and unsearchable tree on Ancestry
[Quick & Dirty as advocated by Blaine Bettinger and others]
It's useful to note who I've used that for. I have some quite significant explorations there but currently can't see who I've worked on there easily. I both need to record this in Legacy AND use the new Tree Tags in Ancestry.

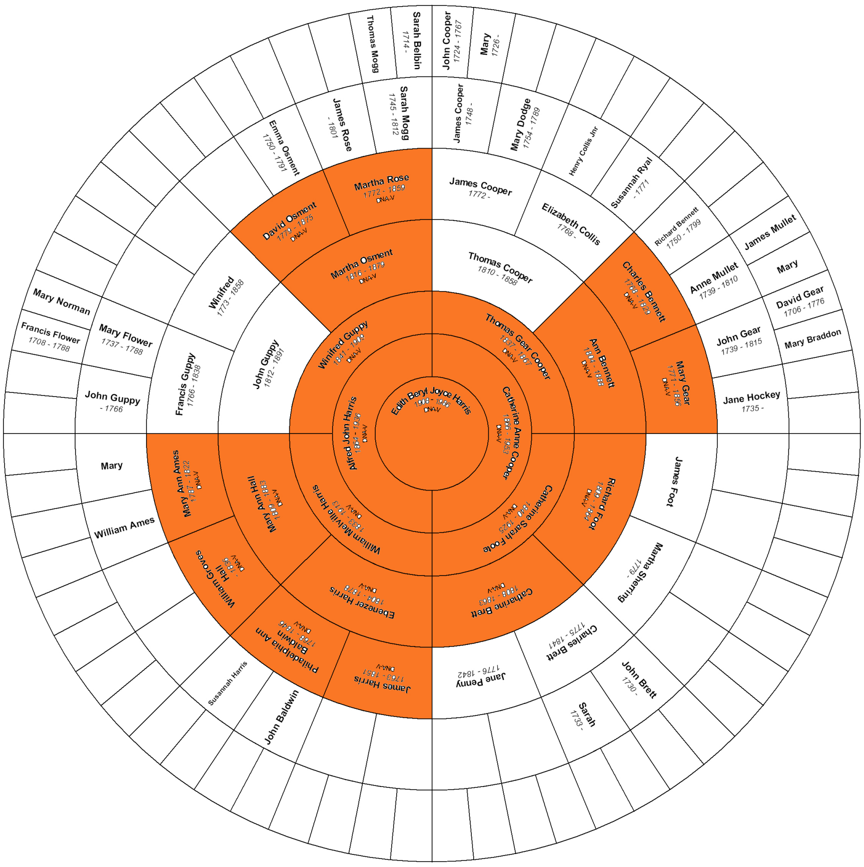
10. USE THE ANCESTRAL FILE NUMBER BOX FOR ANCESTORS VERIFIED BY DNA

The reason we are collecting and sorting out the DNA matches is to verify our tree and get clues for brickwalls. It's helpful to note where you've been successful.
Whether you use one code or several is up to you. You may want a different code when the matches on the line have been triangulated rather than just guessed at from Shared Matches at Ancestry.
If you can connect a DNA tester to your tree, you've likely found the MRCA but not necessarily. If you have a group of testers matching to the same MRCA along different branches from that MRCA, you can be more certain.
Here's one way the hashtagging becomes useful. Search for who has DNA-Test AND a particular MRCA hashtag and you get the number of testers that help to verify that line.
Example:



There's always some uncertainty for distant matches as the match may be on another line. If the lines that match have been geographically separated for numbers of generations AND there is a good paper trail for both lines, I have far more confidence that if the match is on lines that lived in the same area for generations. Hence I regard a 5th cousin match to a Scottish ancestor, whose ancestors emigrated to the USA around the time mine emigrated to Australia in the early to mid 1800s, as a more certain DNA verification than a match to a 5th cousin descended from a Dorset ancestor. The paper trail is not quite so good and I have multiple lines to Dorset ancestors. The match could actually be on an unexplored line.
Note this field can be added to Legacy Charting Charts with or without your own label. This can help you keep track of which parts of your tree you have verified. I use a Fan Chart and export it to jpg then use a graphics editor to flood fill the relevant sections. Example showing my maternal lines:

DNA Ancestor Fan for Harris-Cooper lines



MAKING SURE ALL SIGNIFICANT MATCHES ARE IN LEGACY

I save a Match page to PDF (I use the Opera Browser that has that feature. You may need to Print to PDF). Then I use the Comments options in my PDF reader to check off matches I've entered and more checks on them for updating their entries to follow the above guidelines.

I've been working with DNA for 2 1/2 years and it's taken time to find a system that works well for me. Maybe it will work for you as well or you can adapt it to make it work better.