

Advanced Legacy Family Tree, Genealogy Software

Version 10

September 21, 2024

Website: <https://legacyfamilytree.com/>

Resources attached:

- **Legacy and DNA – Authored by Cathy Pinner and Michelle Simmons Lewis**
- **Toolbars Breakdown – Cathy Amen**

Legacy Help Center:

- **Knowledge Base** <https://legacyfamilytree.com/help-center/>
- **Troubleshooting** <https://legacyfamilytree.com/help-center/?a=General-Troubleshooting-Tips>
- **Facebook User Group** <https://www.facebook.com/groups/LegacyUserGroup/>
- **Intro to Legacy Videos** <https://familytreewebinars.com/webinar-library/?category=legacyfamilytree&subcategory=legacy1>
- **Legacy Unlocked Videos** <https://familytreewebinars.com/webinar-library/?category=legacyfamilytree&subcategory=legacy9unlocked>

Legacy News Blog <https://legacynews.typepad.com/>

Legacy Family Tree Webinars

- Registration for webinars is free; recorded webinars are free for a week after the live session
- Annual membership includes access to Webinar Library **\$49.95/year** (discount coupons available during live webinar)
- Library as of 09/16/24: 2,267 webinars, 418 speakers, 8,859 syllabus pages

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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. Optionally, each source clipboard can hold up to five different citations which can all be pasted at once. This feature used to be in a previous version of Legacy and is now back by popular demand.

Legacy can store up to 5 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.)

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**. (See [Master Source List](#) 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. This reflects your confidence in the accuracy of the information. See [Source Detail](#) 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, 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 ,)

Changing the Order of the Sources

When you are using the option to include up to five source citations on the Source Clipboard, the citations are added to a piece of information in the tab order. That is, the citation on the Source 1 tab is added first, the citation on the Source 2 tab is added next, and so on. If you would like to move a tab to a different position, click the tab to make it current, and then use the  and  arrows at the bottom to move the tab left or right.

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Recommended Actions to do Periodically

- Set Relationships (Tools>Relationship)
- Run Potential Problems List (Reports>Potential Problems)
- Run Media Relinker Report (Tools>Media Relinker)
- Do File/Maintenance Actions (File>File Maintenance)
 - Check/Repair Family File (Do Backup File First!)
 - Compact Family File (Do Backup File First!)
 - List Cleanup
 - Rebuild Source Citations
- Run Tree Finder to check for missing trees or individuals (View>Trees)
- Run a Merge Report (Tools>Merge Duplicates)

Legacy Family Tree

Shortcut Keys

Shortcut Keys to Pull-down Menus

All tab names on the **Ribbon** bar have an underlined letter. You can select a tab by holding down the **ALT** key and pressing the underlined letter. Once a tab is displayed, you can select a menu option by pressing the underlined letter in the option name.

ALT + F File Tab
ALT + E Edit Tab
ALT + A Add Tab
ALT + V View Tab
ALT + R Report Tab

ALT + L Tools Tab
ALT + C Search Tab
ALT + I Internet Tab
ALT + O Options Tab
ALT + P Help Tab

Shortcut Keys for Main Views

ALT + F1 Legacy Home Tab
ALT + F2 Family Tab
ALT + F3 Pedigree Tab

ALT + F4 Descendant Tab
ALT + F5 Chronology Tab
ALT + F6 Index Tab

Shortcut Keys to Bypass Menus on the Main Views

Many menu options have shortcut keys listed next to them. You can choose a menu command by holding down the **CTRL** key and pressing the other key. The shortcut keys listed below are meant to be used only from the main views in Legacy (Legacy Home, Family, Pedigree, Descendant, Chronology, and Index). On other forms, some of these shortcut keys have other functions.

- CTRL + A** Displays the *Ages* dialog box. (On the *Legacy Home* tab, this shortcut key highlights the entire page contents.)
- CTRL + B** Backup a Family File
- CTRL + E** Export a GEDCOM File
- CTRL + N** Add a New, Unlinked Person. (On the Legacy Home tab, this shortcut key opens the Home contents in a separate browser window.)
- CTRL + O** Open a Family File. (Not available while on the Legacy Home tab.)
- CTRL + P** Opens the Picture Center. (On the Legacy Home tab, this shortcut key opens the Print window for printing the Legacy Home page contents.)
- CTRL + Q** GEDCOM Import
- CTRL + S** Display Preferred Startup Family. (Not available while on the Legacy Home tab.)
- CTRL + T** Advanced Tagging
- CTRL + W** Web Page Creation
- CTRL + Z** Opens the Customize window (**ALT + Z** also opens the window)

Shortcut Keys in Dialog Boxes

Most command buttons shown in dialog boxes have an underlined letter in their description. You can click a button by holding down the **ALT** key and pressing the underlined letter. This is equivalent to clicking on the button with the mouse cursor.

Other Shortcut Keys

From the *Information*, *Marriage*, and *Notes* windows, you can press **F4** to display the *Sources* window. From the *Information* and *Marriage* windows, you can press **F5** to display the *Notes* window. From any *Note* field, you can press **F7** to start the spell checker. From the *Information*, *Marriage* and *LDS* windows, **F8** can be used to duplicate field contents from the previously saved record. You can also press **Ctrl-F9** to memorize any location field and **F9** to play the memorized field back to any other location field. (**Shift-F10 / F10**, **Shift-F11 / F11** and **Shift F12 / F12** also work the same way to memorize and play back field entries.)

Shortcut Keys for the Source Clipboard

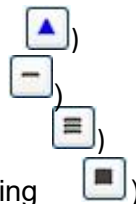
There are shortcut keys available when assigning source citations from the [Source Clipboard](#).

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



Shortcut Keys

Family and Pedigree View

The following single shortcut keys are available while working in the *Family* or *Pedigree View*. To use the shortcuts, simply type the one-character command. The commands are executed immediately when you press the letter.

Single key commands:

- ? Help (help on shortcut keys)
- F Find (displays Search window)
- G Go (to RIN #)
- I Index (displays Name List)
- M Marriage (displays Marriage List)
- X Exit (prompts for confirmation to exit Legacy)

Shortcut Keys on Family View

The following shortcut key combinations are available while working in the *Family View*. To use the shortcuts, simply type the two-character command. The commands are executed immediately after you press the second letter.

Two-Key Commands

- | | |
|--|-----------------------------|
| AD Add Daughter | EW Edit Wife |
| AH Add Husband | HP Husband's Parents |
| AS Add Son | LD Link Daughter |
| AW Add Wife | LH Link Husband |
| C1-C9 and CA-CF | LS Link Son |
| Child 1 - Child 9 and Child 10 - Child 15 | LW Link Wife |
| (moves the child to the Husb-Wife level) | ND New Daughter |
| E1-E9 and EA-EF | NH New Husband |
| Edit Child 1 - Child 9 and Child 10 - Child 15 | NS New Son |
| EH Edit Husband | NW New Wife |
| EM Edit Marriage | WP Wife's Parents |

Shortcut Keys on Other Forms

The following shortcut keys are available while working in various forms in Legacy. Not all of these are available on all forms.

While in a Note-type field:

- Ctrl-B** Boldes the selected characters or words if some have been highlighted by dragging the mouse over them. If nothing is currently selected, pressing Alt-B turns on bold mode so that successive text is bolded as you type it.
- Ctrl-I** Italicizes the selected characters or words if some have been highlighted by dragging the mouse over them. If nothing is currently selected, pressing Alt-I turns on italicize mode so that successive text is italicized as you type it.
- Ctrl-U** Underlines the selected characters or words if some have been highlighted by dragging the mouse over them. If nothing is currently selected, pressing Alt-U turns on underline mode so that successive text is underlined as you type it.
- Ctrl-S** Superscripts the selected characters or words if some have been highlighted by dragging the mouse over them. If nothing is currently selected, pressing Alt-S turns on superscript mode so that successive text is superscripted as you type it.
- Ctrl-F** Opens the Find dialog box where you can search for text within the note.
- Ctrl-C** Copies highlighted text to the Windows clipboard.
- Ctrl-X** Cuts highlighted text from the notes field and places it on the Windows clipboard.
- Ctrl-V** Pastes any text currently on the Windows clipboard to the current position in the note field.
- Ctrl-Tab** Inserts a tab character into the note. (Using tab characters to try to line up columns of information may not result in the desired format when printed on reports.)
- F3** Continues the search to find the next match after starting a search with **Ctrl-F**.
- Ctrl-Z** Undo. Removes any text entered since the last time the note was changed. (This is a Windows function. If you are entering text, anytime you exit a field, or do some other function, like spell checking or searching, the undo feature is reset.)
- F6** Pops up the [Character Map](#) where you can select one or more special character to insert into the note. This can be used to select copywrite symbols or other characters not shown on your keyboard.
- F7** Starts [spell checking](#).
- Ctrl-P** Privatizes highlighted text by enclosing it in **[[** and **]]** characters.
- Ctrl-Space** Removes all formatting from the note including bolding, italicizing, underlining, and superscripting.
- Ctrl-R, Alt-R, F8** Pressing any of these keys works the same as clicking the **Repeat** button which repeats the field contents previously saved on the same type of form.

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