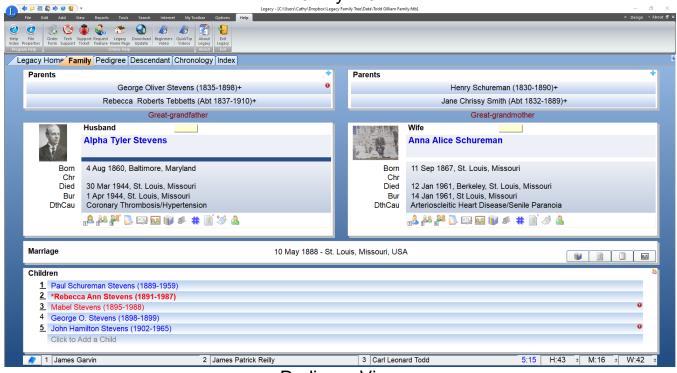
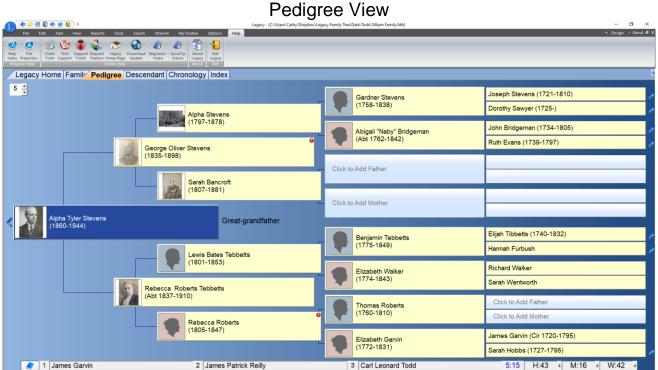
Legacy Family Tree 101

Presented by Cathy Amen November 2020

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

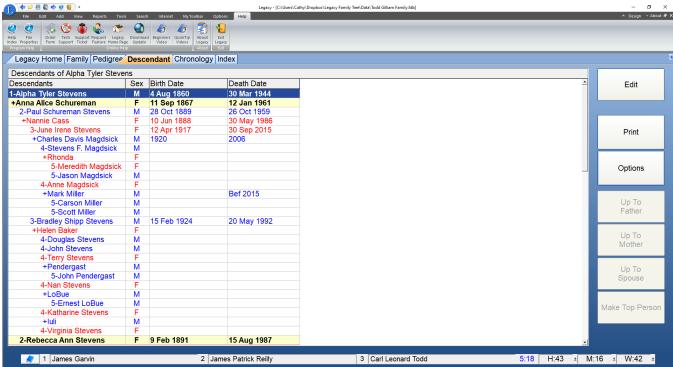
Views in Legacy Family View

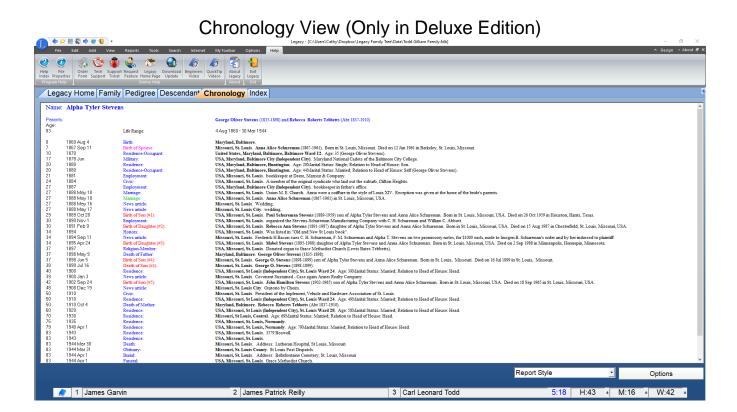




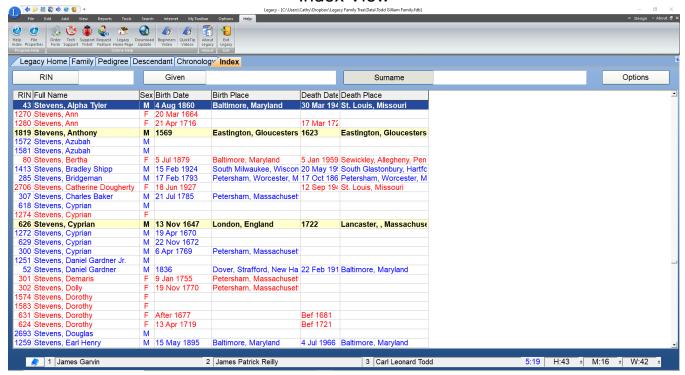
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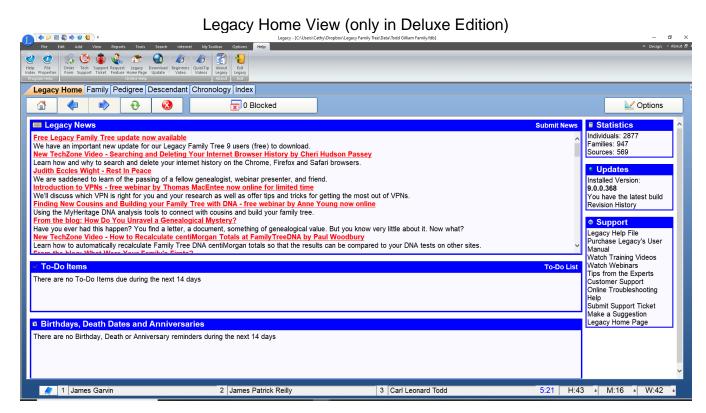
Descendant View



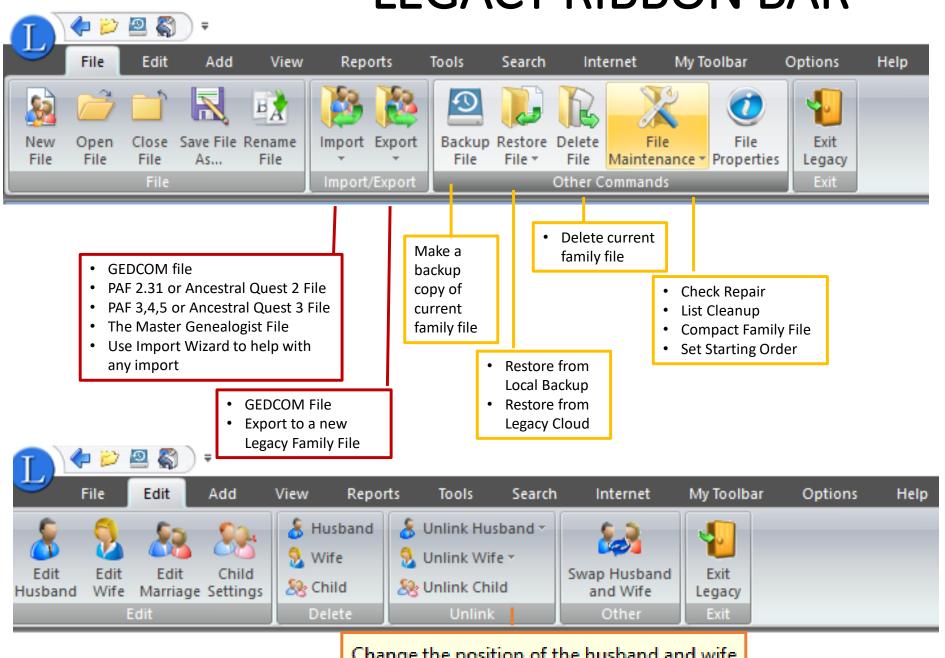


Index View





LEGACY RIBBON BAR



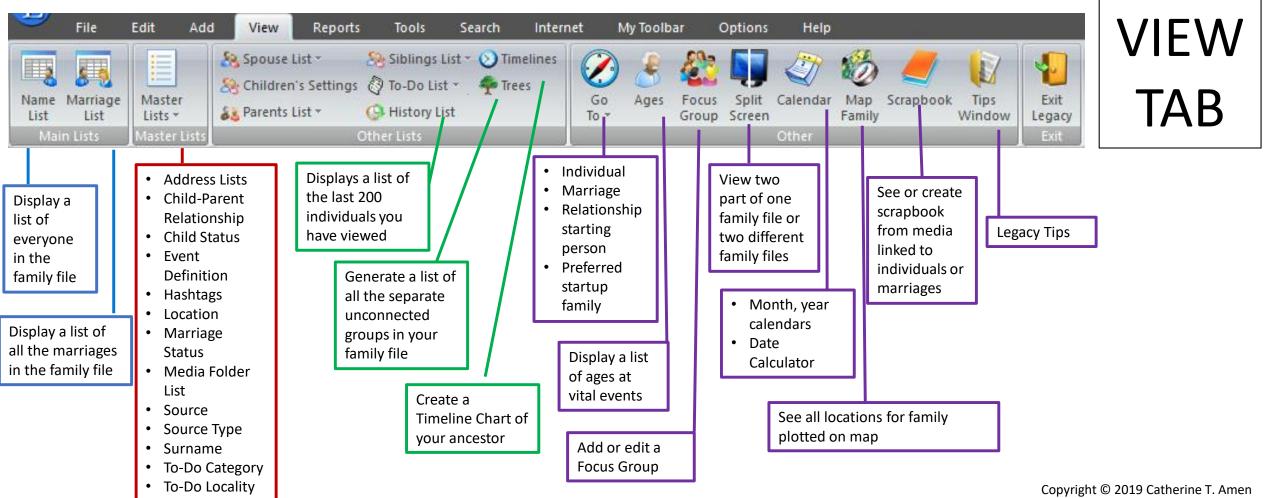
FILE TAB

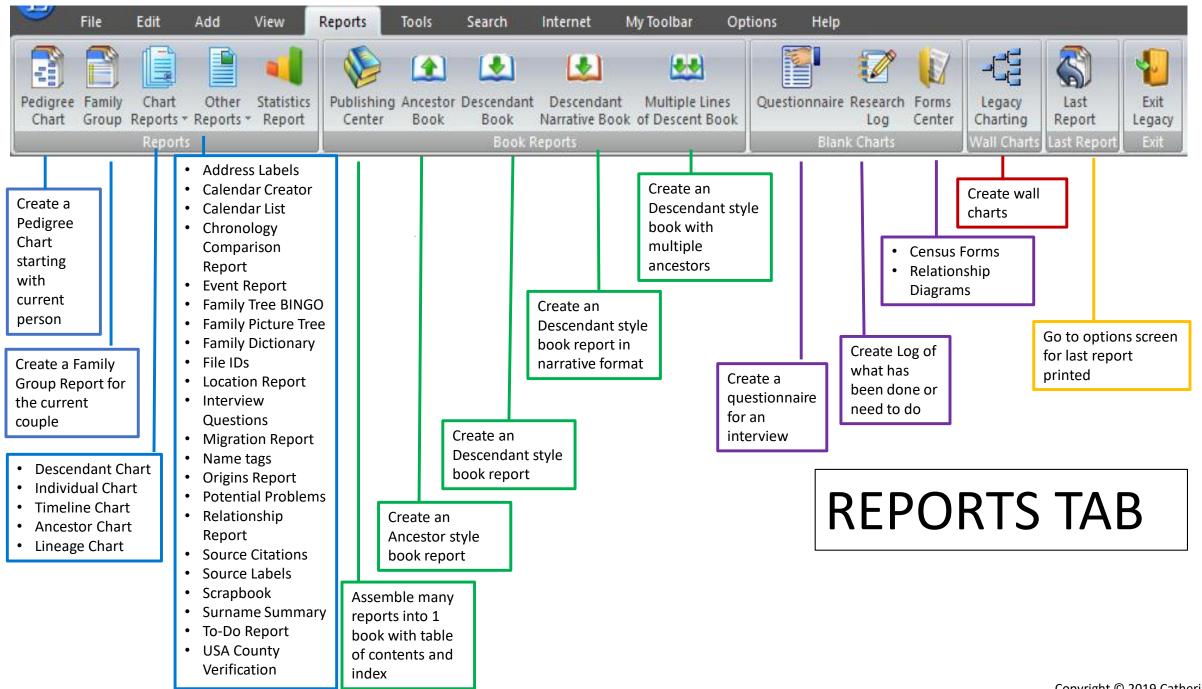
EDIT TAB

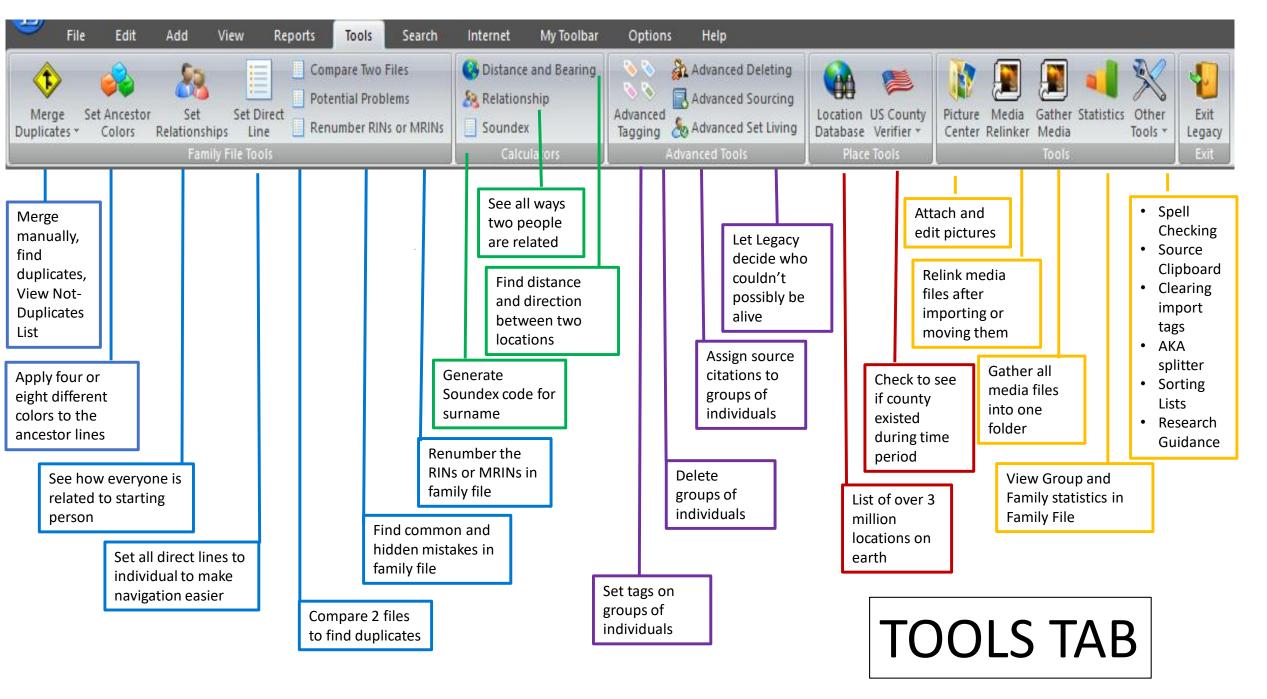
Change the position of the husband and wife

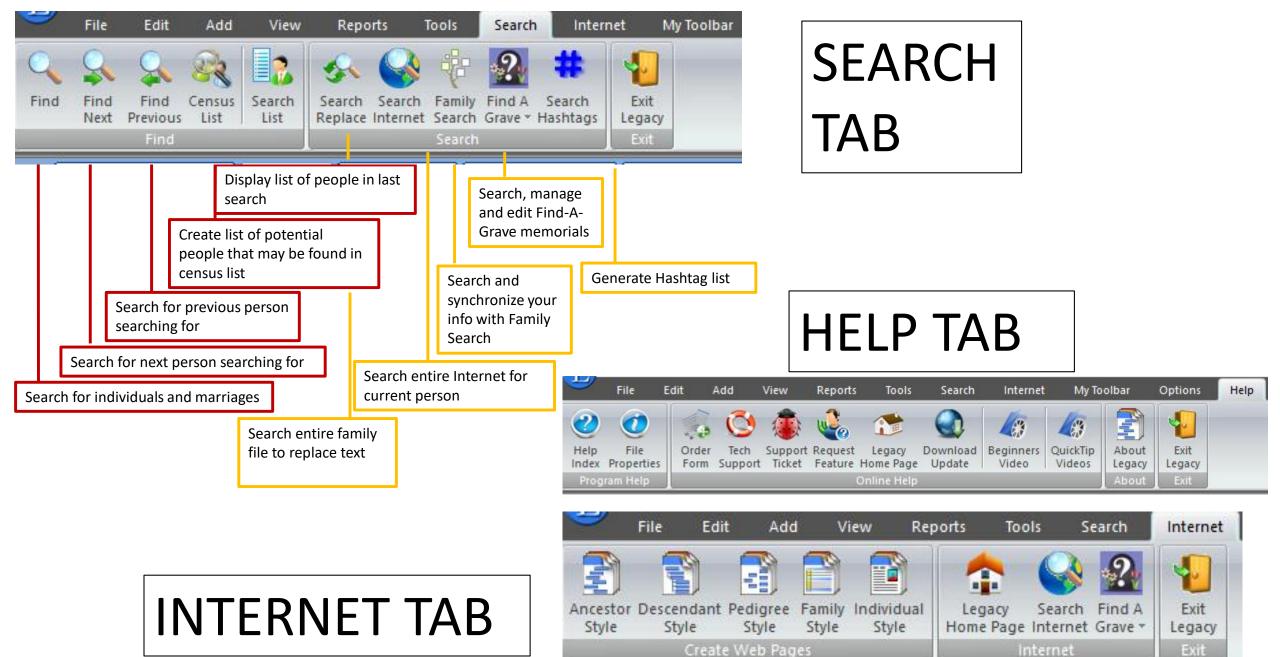


ADD TAB









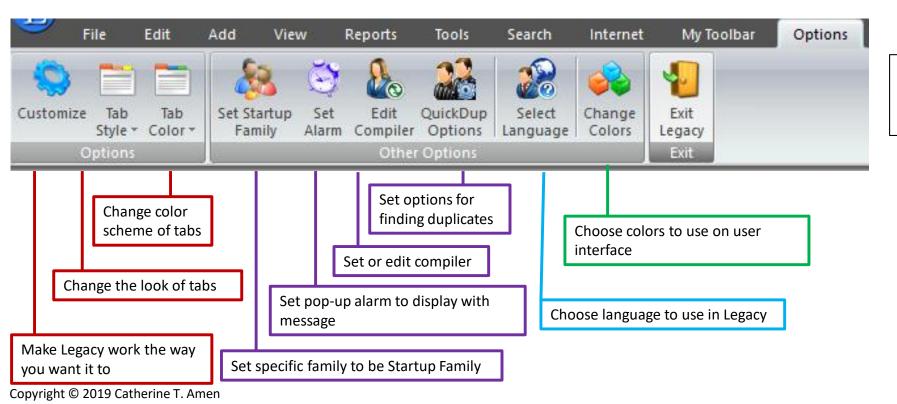
Create web pages in particular styles



MY TOOLBAR TAB

Customize the **My Toolbar** tab to show only the tools you want. There are 15 default tools shown when Legacy is first installed. **To customize**:

- 1. Click on the small icon in the lower-right corner of the **Shortcut Toolbar** group. You can also click the **Design** button in the upper-right corner of the ribbon and choose **Toolbars>My Toolbar**.
- 2. Add, remove, or move tools as desired.
- 3. Click **OK** when you are finished.



OPTIONS TAB

Legacy Tips

Adding a Source

- 1. Add new information to the person.
- 2. Click on the source icon.



- 3. If this source is one you have not used previously, click on **Add a New Source**, fill in the fields, click **Save** fill in the detail, and click **Save**.
- 4. If this source is one you have previously entered for someone else, click on **Cite a Master Source**, select the source, fill in the detail, and click **Save**.

Adding a Source Using SourceWriter

- 1. From the Assigned Sources List from an Individual, Marriage, or To-Do Screen, click **Add** a **New Source**.
- 2. Or from View>Master Lists>Source, click the **Add** button.
- 3. Choose a Source Template by typing in a key word or choose type of source from the list.
- 4. Fill in Source Template fields.
- 5. Save the source. If you are adding a citation, go to **Detail** screen and complete.
- Record the details.

Relationships

Being able to understand how the currently-highlighted individual is related to you can be important. For example, when you clicked on George WASHINGTON, if your relationships were set, it could tell you that he is your ½ 7th great-uncle, 3 times removed. 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.

Tools > Set Relationships and Tools > Relationship Calculator

Bookmarks

Bookmarks are shortcuts to navigating a person. Each program has the ability to quickly navigate to the "home" person. Additional bookmarks can be set. Just set a bookmark on each person, and you can very quickly navigate to them.

Bookmarks icon [2]; CTRL+S (go to startup person); Quick-Bookmarks

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.

Tools > Set Direct Line; make sure starting individual is shown in the text box. Click Set Preferred Line to mark each ancestor as the preferred one.

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Each preferred child is marked with an asterisk. If you want the preferred child to be bold:

Options > Customized > Data tab > Indicated direct-line children in lists

Potential Problems

The tool will search your database for potential problems caused by typos, or misinterpretation of records.

To print the **Potential Problems Report**:

- 1. From the **Report**s menu, choose **Potential Problems**.
- 2. On the **Options** tab, make sure the settings are acceptable.
- 3. On the **Records** tab, select the records you want to check.
- 4. Check the **Summary Style** box if you want the report in short form.
- 5. Click the Page Setup and Change Fonts buttons to make sure the settings are correct.
- 6. When you are ready to print the report, click either the Preview or Print button.

File Maintenance

When individuals are deleted from the Family File, all references to them are removed but the individual's information still exists in the file. To remove the info and make room available for other additions run this report. Legacy runs through your family file and checks the integrity of all the links to ensure that are no pointers to deleted records.

File > File Maintenance/Check/Repair

Create Backups

- 1. Backup to a USB/jump/flash drive, CD, external hard drive
- 2. Create a backup/GEDCOM and sent to family members
- 3. Publish GECOM to an internet site
- 4. Offsite backups: Dropbox, Clouds

Tagging Records

You can tag individuals and marriages to mark them for various reasons. There are 3 tags in *Standard Edition* and 9 tags in *Deluxe Edition*. To tag an individual or marriage:

Click desired tag box. These are located in the upper-right corner of the Husband and Wife boxes and at the right side of the Marriage bar. When an individual or marriage is tagged, the tag box is filled with a color other than gray.

Hashtags (Deluxe Edition only)

Hashtags are a way to create groups of people with some kind of common connection. They can be thought of as keywords or areas of interest. Example: you might want to create a hashtag of *Researchlib* for all the individuals in your family file for whom you want to do research at the library. A hashtag consists of a name and an optional description. To add a new hashtag, simply fill in the name of the hashtag and the description and click the **Save** button. The hashtag (#) symbol will be in bold if one has been assigned.

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Legacy Family Tree

Shortcut Keys

Shortcut Keys to Pull-down Menus

All tab names on the <u>Ribbon</u> 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 + R Report Tab
ALT + P Help Tab

Shortcut Keys for Main Views

ALT + F1 Legacy Home Tab

ALT + F2 Family Tab

ALT + F3 Pedigree 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 <u>Source</u> <u>Clipboard</u>.

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, simple 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, simple type the two-character command. The commands are executed immediately after you press the second letter.

Two-Key Commands

AD Add Daughter

AH Add Husband

AS Add Son

AW Add Wife

C1-C9 and CA-CF

Child 1 - Child 9 and Child 10 - Child 15 (moves the child to the Husb-Wife level)

E1-E9 and EA-EF

Edit Child 1 - Child 9 and Child 10 - Child

15

EH Edit Husband

EM Edit Marriage

EW Edit Wife

HP Husband's Parents

LD Link Daughter

LH Link Husband

LS Link Son

LW Link Wife

ND New Daughter

NH New Husband

NS New Son

NW New Wife

WP Wife's Parents