

Legacy Family Tree for the Professional Genealogist

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Choosing the right genealogy computer program is an important decision for any genealogist. For professionals, this decision is even more critical. They will be working with the software every day as they organize, plan, and share their research findings. Legacy Family Tree was developed with this in mind. While its interface and usability suites the beginner, it is also robust enough to meet the demands of serious researchers.

Legacy's development team includes more than just programmers – it is also made up of genealogists (both the casual researcher and the every-day professional) with a wide range of technical and research expertise. This enables the company to produce software with the genealogist's needs in mind.

Listed below are descriptions of several important features that are important to professionals with brief explanations of how Legacy Family Tree meets their needs. The majority of these tools are only found in Legacy.

SourceWriter

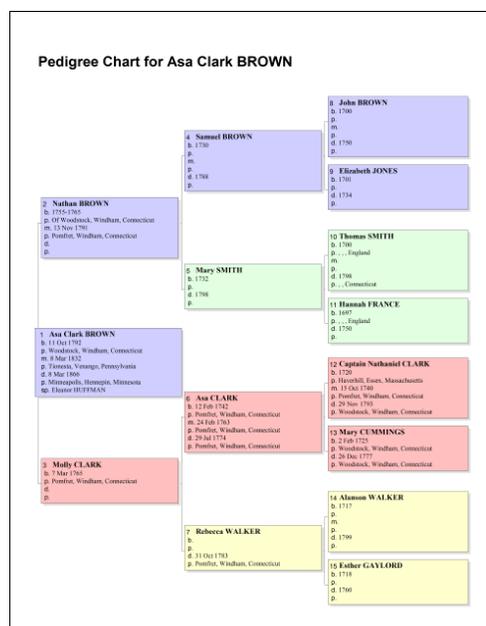
Legacy's SourceWriter makes it easy for both the beginner and the professional to enter citation details as well as achieve consistency. Its templates follow the guidelines in Elizabeth Shown Mills' *Evidence Explained*. Simply select the desired template, then enter the information in the fields. The output will automatically be generated for you.

Organization

Before we can effectively analyze what we know and do not know, we must be organized. Organization is crucial when communicating with clients – you need to be able to locate anything within seconds. This gives the client confidence in you.

Legacy is designed to work with popular document retrieval and organizational systems. Because Legacy uses the same numbering system as Personal Ancestral File (RINs and MRINs), the well-known organizational system also works well. Simply step-by-step instructions are found at <http://www.FileYourPapers.com>.

Legacy's color-coding organizational system works hand-in-hand with the recommendations set by the Church of Jesus Christ of Latter-day Saints' Family History Library. See their document entitled "Organizing Your Paper Files Using File Folders" at <http://www.FamilySearch.org>.

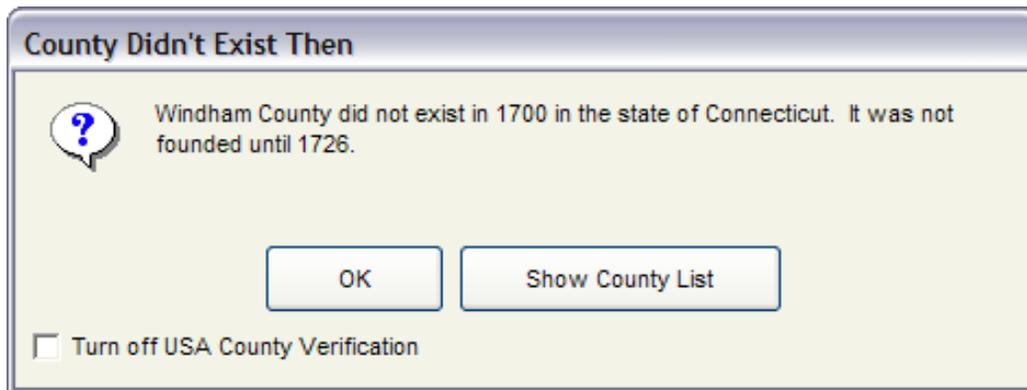


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Different organizational systems work better for some than do others. Millennia has published several popular systems in their *Legacy News* at http://legacynews.typepad.com/legacy_news/organization

Locations

At a recent conference, a researcher asked for help on their brick-wall ancestor from Connecticut. The ancestor was supposedly born in 1700 in Windham County, Connecticut. We entered this information into Legacy and the following message appeared: Brick-wall problem solved. The researcher was looking in the wrong jurisdiction for the time period. Legacy's built-in **U.S. county verifier** warns researchers when wrong information is entered. Clicking on the *Show County List* button provides a list of all known counties, their Start Year, End Year, parent and progeny counties to help identify the correct jurisdiction for the time period.



The **USA County Verifier report** produces a list of all potential problems with these locations through the database. It is accessible via the *Tools* menu.

The **Geo Location Database** includes information on 3.5 million locations from around the world. It can be used to learn the correct spellings of locations, identify the latitude/longitude, identify missing counties, and even perform radius searches. Suppose the ancestor is known to have been from Woodstock, Windham County, Connecticut. Searches in these records were negative. The next logical step is to search the records of the surrounding towns and villages. In the Geo Location Database, simply select the desired location, click on the *Binoculars* icon in the lower right, and enter the desired radius distance. The results will provide a list of all places within the given radius, and the research can progress.

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Finally, consistency in data entry of locations is important for a number of reasons. If you have seen information published where the same location is spelled in a variety of formats –

Charlton, Worcester County, Massachusetts, USA
Charlton, Worcester County, Massachusetts
Charlton, Worcester, Massachusetts
Charlton, Worcester, MA
Charlton, Worcester Co., MA
Charlton, Worcester County, MA, USA

– you may question the accuracy of other information that the researcher is presenting. If these variations of locations are linked to a hundred different ancestors, it will be time consuming to standardize. Legacy's **Master Location List** makes the standardization task simple and quick.

1. Simply highlight the non-standard locations (using Windows' shortcuts of Ctrl-click or Shift-click),
2. click on the *Combine* button at the bottom,
3. highlight the destination location,
4. and click on the *Combine* button once more.

Instantly, all of the non-standard locations are combined with the desired format, thus saving hours of data entry – a costly expense.

Local Histories and Research Guidance

Understanding the history of where your client's ancestors lived will not only help you extend the research, but will also kindle the relationship with your client as they learn about their ancestor's history. Local and county histories not only provide historical, geographical, religious, economic, and social information, but they are filled with extensive biographical information. Locating these local histories is usually not a major undertaking, as most major universities, and especially the Family History Library have good collections.

However, the Family History Library only has a small percentage of published local histories. Just *knowing* that other histories exist and where they are located brings hope and renewed determination for even the strongest brick wall researchers. Legacy's **Research Guidance** contains the most comprehensive directory of North American local histories in existence. In fact, of all the listings of local histories that Legacy contains, the complete collection of the Family History Library only accounts for about ten percent of those in existence.

To access the register, click on the *Research Guidance* tab, and click on the *Preliminary Survey* button. Then click on the *Local Histories* tab. Legacy displays a listing of all the local histories that are relevant to the current individual. Because the data (names/dates/places) about the person has already been entered, Legacy knows where the person lived, and then recommends only the local histories that would pertain to them. Many of these histories are being published online – clicking on the *Online* button takes you directly to the text.

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Research Guidance also analyzes the known information, and provides suggestions based on the goal of birth, marriage, death, parents, siblings, maiden name, and history. These suggestions are prioritized in the order in which they should be searched to achieve the goal. Beginning researchers appreciate the 24/7 assistance; professionals benefit from the checklist-style approach. It is difficult, even for the seasoned professional, to remember all the different sources available, and to keep up with the new indexes being published online. Many professionals use Research Guidance as a checklist to ensure that they have covered everything. Legacy's Research Guidance is built-in, no additional software is required. Just click on the *Plan to Search* button, and the source is added to your To Do List.

Asa Clark BROWN
 b. 11 Oct 1792, Woodstock, Windham, Connecticut
 d. 8 Mar 1866, Minneapolis, Hennepin, Minnesota

Review Timeline | Preliminary Survey (94) | **Suggested Sources (114)** | To-Do List (5)

Goal: Birth | Goal: Death | Goal: Marriage | Goal: Parents | Goal: Siblings | Goal: History

90 Suggested Sources

Rank	Source Name	Online	Ignore	To-Do	Done
3	Minnesota State Census, 1857				<input type="checkbox"/>
3	Newspapers	✓			<input type="checkbox"/>
3	Taxation 1789-1850				<input type="checkbox"/>
3	Taxation 1851-1900				<input type="checkbox"/>
3	Town records of New York				<input type="checkbox"/>
4	Directories 1789 to 1850				<input type="checkbox"/>
5	Admiralty Court & Record Revolutionary Period to 1850				<input type="checkbox"/>
5	Barbour Collection: Connecticut Vital Records Prior to 1850 -	✓			<input type="checkbox"/>
5	Bounty land claims				<input type="checkbox"/>
5	Civil War - Union Service Records				<input type="checkbox"/>
5	Civil War - Union Service Records Index	✓			<input type="checkbox"/>
5	Colonial Military Records of other nations				<input type="checkbox"/>

Plan to search | Online | Options

Source Output:
 Minnesota. Census Bureau, *Schedules of the Minnesota Census of 1857* (Washington, District of Columbia: National Archives. Central Plains Region, 1973).

The Source can be found at the following Repositories:

Name	E-Mail	Online
Family History Library		
Minnesota Historical Society		
National Archives and Records Administration		

E-mail | Website | Repository Info

Source Tip
Minnesota State Census, 1857: This census may provide information on the following: name of each person in the household, age, sex, color, place of birth, voters, occupation.
Source Category Description: (Census)
 A compilation of official enumerations of the people of a particular area with details of age, occupation, and birth localities of those enumerated. Later census records usually contain more information than earlier census records. Information varies from one country to another, but could include relationships, number of children in the family, birth localities of those enumerated as well as their parents, immigration dates, languages spoken, dates at the time of marriage, and previous military service.
Repository: Family History Library
 Can visit the library in person, borrow its films through a local Family History Center, or hire someone to search the facility for you.

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Planning

Good research, especially when working with clients, demands that you keep a log of research performed. The log reminds researchers what they have already looked at, contains bibliographical information about the sources searched, and records the results.

Legacy's **To Do List** acts as a Research Log *and* as a To Do List. The tasks, which can be linked to each individual or to the family in general, can be filtered by category, location, status (open/closed), type (research, correspondence, other), and priority. The log or To Do List can be printed at any time – before the trip to the FHL, or at the request of the client. They can be printed by individual, group of individuals, or by repository. Valuable time and planning is saved when you can hand the list off to one of your record look-up consultants, or perform the research yourself.

Better analysis

Legacy's **Chronology View** is the software's most powerful tool. Viewing an ancestor's life in chronological order opens new doors and possibilities because of the different perspective. A timeline can suggest obvious errors, such as an improbable age at marriage (129 when it should have been 29). Or if it displayed several children all born within the same year, it can infer that you might have researched and combined two families with similar names, dates, and places. This perspective is difficult to attain by studying a Family Group Record.

Clicking on the *Chronology View* tab automatically gathers all known information about the ancestor – their vital events (birth, christening, marriage, death, burial), their custom events (residence, will proved, census, etc.), the births and deaths of their children and parents, and much more.

Legacy also contains an extensive database of **historical timelines** that can be combined with the individual's timeline. Understanding history in the context of their lives will also suggest new avenues of research that had been overlooked.

You can create your own historical timelines for needed analysis. William McCALL was born in 1780 in the area that would become Washington County, Tennessee. At that time it was in North Carolina. In 1784 it became part of the State of Franklin. Five years later, after Franklin dissolved, it became part of the Western Territory South of the Ohio River. Finally, in 1796, Tennessee became a state. Understanding these jurisdictions is important. To help with your analysis and understanding of the changing boundaries, you can create a timeline which outlines these events. Legacy can incorporate this within William McCALL's timeline and help you see where he fits. For more information, read *See Your Ancestor in History* at http://legacynews.typepad.com/legacy_news/2006/11/see_your_ancest.html

Legacy's feature to display ½ **siblings** in the Family View is a significant analysis tool. Asa BROWN's first wife died. They had four children together. His second wife's (Eleanor) first husband also died young, leaving three children. When Asa and Eleanor married, they had several children from their previous marriages. These children all grew up together. But if the analysis of the family is left to studying the two Family Group Records, researchers may not

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quickly pick up on the fact that they should be searching for *all* of these children in the same household. These ½ siblings appear in the Family View to help your understanding of these relationships.

Professional researchers also understand of the importance of searching for and recording all variations, nicknames, and spellings of the ancestors' names. Not only will Legacy help you record all these variations, but each variation appears as its own entry in the *Index View* and *Name List*. Therefore, searching for Frederick GOAS in the index, who was also known as Fredrick GOAS, Asa GOAZ, Frederick GOAZ, Frederick GOES, Frederick GOEZ, Frederick GOOZ, and Frederick GOZ becomes much easier to locate. All of these variations can be included in your Family Group Record and other reports, including the To Do List. Because of this, you are reminded to search for these variations in databases and indexes.

Information retrieval

One of the most common uses for genealogy software is to search and retrieve information. Legacy has powerful searching and tagging tools to retrieve information. Using the Search tool, questions like the following can be answered:

- Who, in the JOHNSON ancestry, was of age and alive to have be listed in the World War I draft registration cards?
- How do I find ancestors for whom no documentation (sources) exist?
- How do I find ancestors who have missing information?
- Who lived in Hennepin County, Minnesota at any time of their lives?

Once these searches are performed, they can be “tagged”. You can tag an individual, or a group of individuals, who have something in common. Thereafter, the list of tagged individuals can easily be retrieved and used for analysis, exporting, or printing. Legacy has nine levels of tags. Each can be assigned its own color and description. Therefore, if you continually refer back to the “females born in Connecticut who migrated to Kansas between 1860 and 1880”, you can first search for them, and tag them. This list can be retrieved at any time.

Multimedia

As you gather data and sources, you likely come across and obtain electronic media. Legacy allows you to link images, sounds, or videos to sources, events, locations, repositories, and much more. These types of electronic documents not only serve as an easy reference source when linked to the individual, but they also bring excitement to the client as they can actually see their ancestor's name in an historical record.

Sharing the electronic media with your clients can be challenging. If you share newly-found information with the client via a GEDCOM or even a backup file that they can view on their computer, they will not receive the multimedia. It is simply not supported by the current GEDCOM model. The Family Tree Maker software is the only software that actually embeds the multimedia into the database, thus making it easier to transfer multimedia, however it also greatly increases the size of the database making it difficult to send via email.

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Legacy has a solution to both preserve and share multimedia. Its **Backup Multimedia** feature (found within the *Backup* menu) will locate and compress all multimedia that is linked to the current database, into a smaller zipped file. This zipped file can then be shared, along with the GEDCOM or backup, and unzipped on the recipient's computer. Using software without this tool makes it very difficult to identify only the pictures that are linked to the database and share them.

Reporting

Legacy offers several unique reports that are helpful to the professional for either displaying the information, trying to obtain information, or helping the client follow their research report.

Blank lines in reports. One of the most challenging tasks when working with new clients, or even when working with our own living relatives, is obtaining information from them that they already know. Asking them to fill out a blank Family Group Record can be an intimidating and difficult experience. Legacy's ability to include blank lines for missing information makes this task achievable.

In any of the book-style reports, on the main screen, select the options in the upper left to insert blank lines for missing names, dates, and places. The resulting report looks similar to the

Descendants of Asa Clark BROWN

First Generation

1. **Asa Clark BROWN**, son of **Nathan BROWN** and **Molly CLARK**, was born on 11 Oct 1792 in Woodstock, Windham, Connecticut, died on 8 Mar 1866 in Minneapolis, Hennepin, Minnesota at age 73, and was cremated in ____/Mar 1866 in Minneapolis, Hennepin, Minnesota. Another name for Asa was Clark BROWN.

Asa married **Elizabeth REYNOLDS**, daughter of _____ and _____, from 1810 to 1815 in _____, Elizabeth was born in 1794/1804 in _____, Massachusetts, died before ____/Mar 1832 in _____, _____, and was buried ____/____/____ in _____, _____.

Children from this marriage were:

2 M i. _____ **BROWN** was born about ____/____/1815 in _____, _____, died ____/____/____ in _____, _____, and was buried ____/____/____ in _____, _____.

+ 3 M ii. **Reverend Nathan R. BROWN** was born about ____/____/1817 in _____, Pennsylvania, died on 5 May 1897 in Fairfield, Clay, Nebraska about age 80, and was buried on 6 May 1897 in Fairfield, Clay, Nebraska.

4 M iii. _____ **BROWN** was born about ____/____/1819 in _____, _____, died ____/____/____ in _____, _____, and was buried ____/____/____ in _____, _____.

+ 5 M iv. **Reverend Lorenzo D. BROWN** was born on 9 Jul 1822 in Tionesta, Venango, Pennsylvania, died on 14 Jan 1918 in Minneapolis, Hennepin, Minnesota at age 95, and was buried on 16 Jan 1918 in Minneapolis, Hennepin, Minnesota.

Asa next married **Eleanor HUFFMAN** on 8 Mar 1832 in Tionesta, Venango, Pennsylvania. Eleanor was born on 11 Jan 1803 in Kingston, Frontenac, Ontario, Canada, died on 3 Jun 1874 in Saint Cloud, Stearns, Minnesota at age 71, and was buried ____/____/____ in _____, _____.

following:

With a report like this, the client/relative knows *exactly* what information you lack and can easily return it. This kind of a report can also help you solicit the return of an old client by suggesting that there is more that can be done to complete an ancestral family's information.

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Charts can help the client visualize and understand their relationship to the ancestor about whom you are reporting. In the following example, Hugh DAYTON, is the client. (Yes, he's deceased, but we're pretending here.) You, the researcher, are reporting on his great-grandmother, Eleanor HUFFMAN.

Legacy can color specific boxes on pedigree charts to help the relationship stand out. The client can now easily understand their relationship to whom you are writing.

