Legacy FamilySearch Overview



Legacy Family Tree is "Tree Share" Certified for FamilySearch™ Family Tree. This means you can now share your Legacy information with FamilySearch™ Family Tree and of course pull information from Family Tree into your Legacy family file. Legacy's FamilySearch

integration features are available in both the Standard (free) and Deluxe editions.

The *Legacy FamilySearch* screen is reached by clicking the **FamilySearch** button on the **My Toolbars** tab of the **Ribbon** bar. It can also be reached by clicking on any double-arrows icon next to any name on the Family or Pedigree View.

You must have the FamilySearch option turned on in order to use the FamilySearch feature. You must also be connected to the Internet. To turn on FamilySearch integration in Legacy Family Tree 8.0, click on **Options** and select **Customize**. Next click on **1. General Settings**, then scroll down to **1.8 FamilySearch** and click **Save**.

What Can I Do Here?

Legacy makes it easy to work with FamilySearch. By incorporating a convenient, four-step process, combined with easy filtering of your family file, you start with manageable projects so that you are not overwhelmed by what you can do with FamilySearch integration. Please visit http://www.familytreewebinars.com/download.php?webinar_id=237 to watch the free *Legacy Family Tree and FamilySearch FamilyTree* webinar.

Don't Try to Do Everything at Once

It would be a daunting task to see a list of thousands of names to work on right at the beginning. So, when you first come into Legacy FamilySearch to start using it, you are presented with a list consisting of only four generations of ancestors to work with. As you progress through the simple steps, Legacy tracks your progress with a percentage bar so you can see how you are doing. When you complete everything (or mostly everything) for this group, you can expand the list by another generation or two and continue on.

Watch the Videos

There are several free videos explaining eveything you can do in Legacy FamilySearch. If you get stumped and want to see how something is done, click the **Watch Videos** link in the upper-right corner of the screen.

A Few Things to Take Note Of Before You Get Started

Here is a quick tour of the elements you see on the screen. It's good to be familiar with the various sections on the screen and how they can help you work through the successive tasks you will want to complete.

The Legacy FamilySearch screen is divided into a few main sections.

Main Top Tabs

Across the top are main tabs.



When you first come into Legacy FamilySearch, you are shown the **Tasks** tab. This is where you will do most of your work. The other tabs are used to present other tools and options.

The **Tips & Updates** tab lets you read current articles about Legacy and FamilySearch and lets you see if you have the latest update of the program.

Name List

Along the left side of the screen is the **My Legacy People** list. This list shows the group of people who you are currently working on as a project. It can range from all the people in your entire Legacy family file down to a much smaller group consisting of one or two generation of the ancestors or descendants of a particular person. It is easy to use and easy to change. (See <u>below</u> for details.)

Above the list you are shown the current filter setting (which determines who is contained in the list). You can see how many people are in the list and how far you have progressed in completing the tasks for this group. Each person in the list has a background progress bar showing what percentage of the tasks have been completed. Your goal is to reach 100% for each person.

At the bottom of the My Legacy People section is an area with four tabs:

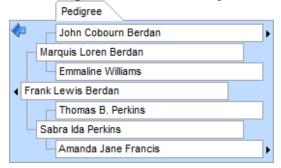


The **Tasks** tab shows you which of the four tasks you have completed for the current person in the list.



These three tasks match the tabs in the main information section of the screen (described below).

The **Pedigree** tab shows a 3-generation pedigree chart that is completely navigatable.



You can use it to quickly move up and down ancestor and descendant lines. When you click on a different name in the **My Legacy People** list, the pedigree chart contents change so it starts with the highlighted person in the list.

The **Details** tab shows the basic vital information for the current person in the list.



The **Legend** (shown on the right) shows you what each of the icons used throughout Legacy FamilySearch means and also what the highlighting colors mean in the main information.

Make more reading room. You can make more room to read long lines of information by hiding the My Legacy People side of Legacy FamilySearch by clicking the

Individual might be linked to the wrong person in FamilySearch

Highlighting colors

Data is the same on both sides

Information only available on one side

Similar data, but not exact

Name list

Legacy living indicator is set to

Person is matched and in sync

FamilySearch does not have

FamilySearch has information that

Person is matched to someone in

* Possible duplicates to combine

Individual is linked to someone in

Individual is not linked to anyone in

with FamilySearch

you do not have

FamilySearch

FamilySearch

FamilySearch

Auto Matched

You have information that

button in the upper right corner. To show The Name List side again click the Show Left Panel button.

Tasks Tab

Main Information Section

The main section to the right of the **My Legacy People** name list is where you will do most of your work. It is divided into seven task tabs:



As you click on each name in the **My Legacy People** list, you will be systematically taken through **Matches**, **Duplicates** and **Share Data**. The **Sources**, **Discussions** and **Changes** tabs are optional. Each task and how it works will be explained further on in this topic. (See <u>below</u> for details.)

So now you know mostly know what you are looking at on the screen. Below is a detailed explanation on how each section works.

My Legacy People

What the Name List Shows

The list is made up of six columns:

RIN - the record identification numbers assigned to each person in your family file.

Name - the names of the individuals.

Born - the birth year of the person, if known.

Sync Icon - an indication of the sync status for each person. **Z Z Z Z** Two green arrows means that the Legacy person's information and the FamilySearch information are synchronized. A red right arrow means that the Legacy person has information that FamilySearch does not. A red left arrow means that FamilySearch has information that the Legacy person does not. Two yellow arrows means the person has been Auto Matched to someone at FamilySearch (provisionally matched).

Duplicates Icon - If the icon is displayed it means that there are uncombined duplicate records.

Filtering the List

The **Current Filter** area is at the top of the **My Legacy People** area. By default, the list contains the starting person and up to four generations of his ancestors. This is a good starting point when working with FamilySearch. If you would like to expand (or contract) the scope of the list, click the **Edit...** link in the **Current Filter** section at the top of the list. This opens the *Filter Options* screen where you can change the starting person and what group of related people you want to include in the list.

Main Information Section

Step 1: Possible Matches

When you click on a person in the name list, Legacy starts the first task automatically which is to search for a person in FamilySearch who matches your Legacy person. Most often, even if you have very little information on your Legacy person, one or more possible matches will be found in FamilySearch and placed in the **Possible Matches** area. Sometimes you will find dozens of possible matches. The matches are ranked by FamilySearch from one to five stars, which show under the name, and are place in the list with the highest ranking names at the top. Names with four and five star rankings are very likely to be matches to your Legacy person. Names of lesser ranking should be looked at very closely to make sure there is enough matching information to conclude a match. Don't automatically rule out possible matches with one or two stars however as they are often obvious matches.

When Legacy completes the search for possible matches and places the results in the upper list, the first, highest ranked name is highlighted. Your Legacy person is placed on the left side, below the possible matches list, and the FamilySearch person is placed on the right. The different types of information are grouped (Name, Personal Information, Facts and Events and Family Relationships) and lined up side-by-side making it easy to compare. If there is more information than will fit in the vertical space available, scroll bars appear that can be used to move up and down. The two scrollbars are "locked" together, meaning that if you scroll one person, the other will also scroll, keeping the data lined up.

Comparing Information

Information shown with a green background means that your Legacy person's information is the same as the FamilySearch information. Anything with a yellow background means that you have information that FamilySearch doesn't have or FamilySearch has information that

you don't have. Information with a red background means that your data and FamilySearch's data conflict in some way. All these color highlights make it very easy to compare the two people and determine if they are the same individual.

Look At Everyone in the List First

If there is more than one person in the possible matches list, you should look at them all before deciding which one to link to. Many times you will find more than one person who is obviously a match for your Legacy person. Linking to the first one you see might cause you to miss a better match below it. Keep in mind that the people in the list who you don't link to will be displayed in the next task, *Possible Duplicates*. It is better to link to the best person in the list and then combine information from the other people in the next step.

Linking the Legacy Person to a Person in FamilySearch

Your goal is to link each of your Legacy individuals with an individual in FamilySearch. If you determine that the two people you are looking at are the same person (and are the best match of all the people in the possible matches list), click on

This person is the same as mine. This

creates a link between the two and Legacy now moves on to the next step, **Possible Duplicates** (see below).

Note: If you have linked one of your Legacy individuals to an individual in FamilySearch and you want to undo the link for some reason (perhaps so you can link them to someone

else), you can do this by clicking the **Unlink person** Information section.

Unlink person button at the top of the

What If They Are Not the Same?

If you can see that the two people are not the same person, or probably are not, move to the next person in the *Possible Matches* list above. If there are no more people to compare then there are a couple things you can do:

Refine the search criteria - Click the else you might search for to find a match.

If Legacy FamilySearch still cannot find a match, click the button - this will pop up a submenu where you can choose **Add My Legacy Person to FamilySearch**. This uploads the known information on your Legacy person to FamilySearch and then links the two together.

Refreshing the List

FamilySearch is a "moving target" in that the information contained on its Internet data servers is constantly changing as millions of people make additions and edits. You are probably safe during the few minutes it might take to compare the possible matches, but if you are called away from your computer for a while, you might want to refresh the possible matches search before you continue. This can easily be done by clicking the Refresh button above the right edge of the FamilySearch person on the right.

Potential Problems

You may sometimes see a • icon next to a piece of information for a person on the screen. This can be on either a Legacy person or a FamilySearch person. This means that

there is a potential problem with that particular piece of information. If you hover your mouse over the icon, a message pops up showing you what might be wrong.

The **Potential Problems** feature in Legacy FamilySearch can be turned on or off from the Potential Problem Options screen. You can also turn off any of the many problems that Legacy checks for.

Step 2: Possible Duplicates

The next step after matching your Legacy person with the counterpart on FamilySearch is to combine any duplicate individuals who are found on the FamilySearch side. Since many, many people contribute people and information to the FamilySearch site, there are bound to be duplicates.

The process is very similar to that used in **Step 1** above. The list of possible duplicates is shown at the top of the main information area. Your Legacy person and his or her information is shown below the list on the left, and the highlighted person in the possible duplicates list is shown on the right. Again, the field background colors help you quickly compare information.

Note: If Legacy can't find any possible duplicates in the FamilySearch database, Step 2 will be skipped and you will be taken directly to Step 3: Share Data.

After carefully examining the first possible duplicate, you have the following choices:

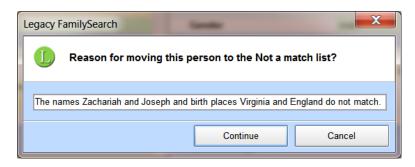
Do nothing yet - You should make sure you look at all the people in the list to get a feel for who all is being presented as possible duplicates.

The possible duplicate is the same as your Legacy person - If you are sure the possible duplicate on the right is the same person as your Legacy person, click the **Same person** button. When you mark a possible duplicate as Same Person you will then be able merge the two FamilySearch individuals.



Legacy will then do another search for possible duplicates. This is done because after finding and combining duplicates, other previously unnoticed duplicates might be found.

The possible duplicate is NOT the same as your person - If you can determine that the FamilySearch person on the right is not the same person as your Legacy person on the left, click the Not a match button. You will be prompted to give a reason for moving this person to the Not a match list.



If you need to review or remove someone from the persons you have added to the *Not a match list* click the Review "not a match" list button.

Skip this Step – If there are too many possible duplicates to deal with at the present, or you just want to move on, click the Skip this step button on the right side of the screen. You can come back to the **Duplicates** tab at another time.

Step 3: Share Data

The **Share Data** tab is where you can exchange information back and forth between your Legacy person and the FamilySearch person he or she is linked to. **My Legacy Person** is on the left and the **FamilySearch Person** is on the right. As in previous steps, the field background colors help you quickly compare information.

Note: If you combined duplicate people in Step 2, the FamilySearch Person you now see on the right is a combination of all the information from all the combined individuals.

What can I do on this screen?

Upload name and event information from your Legacy person up to the FamilySearch person.

Download information from the FamilySearch person to your Legacy person.

Add parents, spouses, and children of your Legacy person to the FamilySearch person.

Add parents, spouses, and children of the FamilySearch person to your Legacy person.

Viewing the FamilySearch Event Details Box

At the far right side of each piece of information on the FamilySearch Person, is a formation. Clicking this icon displays the *Event Details* box. This box contains all the information on the name or event found on the FamilySearch site. It also contains the names of the people who contributed the information and often their email address so you can contact them.

Copying Information Back and Forth

Along the left edge of both My Legacy Person and the FamilySearch Person, there is an arrow (or that is used to copy information between Legacy and FamilySearch. Clicking either of these icons initiates the copy process.

Copying Information from FamilySearch

When you click the old icon to the left of a piece of information or person on the FamilySearch side, the *Select an action to perform* window appears where you can choose how you want to handle the item and what kind of source citation you can to create (if any).

If you are copying a name, you have the choice to either add the name to your Legacy person as an Alternate Name, or to replace the main name with the FamilySearch name.

Copying vital information (birth, christening, death, or burial) gives you the options to add alternate event versions of them to Legacy or to replace the Legacy information.

Copying events lets you add the events to the Legacy person list or replace events with the FamilySearch equivelant.

When you copy people, such as parents, spouses, or children, you have the option to link them to the Legacy person's equivalent (for example, if the Legacy person's father has not been linked yet to a person in FamilySearch, you can link the father to the father you are copying from FamilySearch).

Copying Information from Legacy to FamilySearch

Copying information from Legacy to FamilySearch is much like copying information the other way, from FamilySearch to Legacy, with a few exceptions. For example, when you copy a person to FamilySearch, a father or mother for example, Legacy checks for possible duplicates in FamilySearch in case the person is already there. If possible duplicates are found, a new Combine Duplicates screen is displayed so you can take care of the combining. This process is also done when adding Spouses and Children to FamilySearch.

When You Are Finished Sharing Data

When you have copied and added all the information and people to and from Legacy and FamilySearch and are satisfied with the results, you can mark the individual as "synchronized" by clicking the lam finished sharing data button. This will change the double arrow icon to green-green.

Go to FamilySearch.org

If you want to launch your Internet browser and go to the FamilySearch.org website and navigate to the currently selected individual in the Name List (who must be linked to someone

in FamilySearch), click the FamilySearch.org button.

Sources tab

The **Sources** tab allows users to share sources between Legacy and FamilySearch with the click of a button.



Along the left edge of both My Legacy Sources, there is an arrow that is used to copy sources between Legacy and FamilySearch. Clicking opens a *Upload this source to FamilySearch* screen where the user can select where the source will be added – Name, Gender, Birth, Christening, Death or Burial; and also include notes and comments. When done selecting your options click the **Upload source** button. Downloading of sources from FamilySearch to Legacy will be coming soon.

At the far right side of each source on the My Legacy Source and FamilySearch Source, is a icon. Clicking this icon displays the *Edit FamilySearch source description* box. This box contains all the information on the source found in Legacy Family Tree or on the FamilySearch site. It also contains the names of the people who contributed the source to FamilySearch and often their email address so you can contact them.

Discussions tab

Add a new discussion

The **Discussions** tab provides a great way to coordinate family history work with other Family Tree users. Participating in FamilySearch discussions is easy. They work like social networking sites that you may already use. To start a new discussion, simply click the

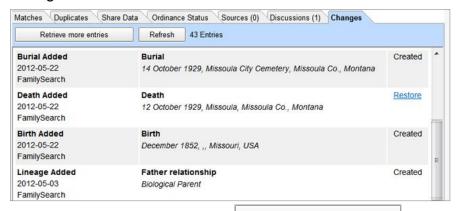


To respond to an ongoing discussion, click the **Add a Comment** link. To change your comment click the **Edit** link, and to remove your comment click the **Delete** link.

Changes tab

Family Tree tracks all changes made to the information about a person and the relationships that he or she is part of. If someone makes a change that you do not agree with, you can use the change history to restore a previous version of the information. You can undo changes

regardless of whether you originally added the information or made the change. To undo a change click the **Restore** link.



To see more changes click the Retrieve more entries button.

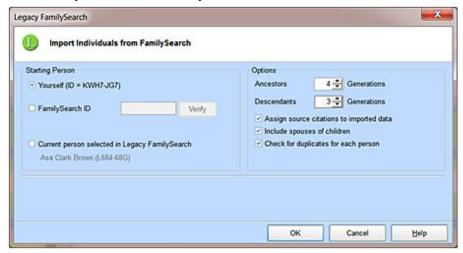
Other Features found Legacy FamilySearch:

Reloading Your Legacy Family File

The Reload button is for reloading your Legacy family file. There are times you may make changes to people in Legacy Family Tree while you are working in Legacy FamilySearch (or you may need to reload your family file for other reasons). When you come back to the Legacy FamilySearch screen click **Reload** to update your Legacy people.

Import Tree

Click on Import Tree to import a tree from FamilySearch starting with yourself, or starting with a person whose FamilySearch ID you enter, or starting with the current person in Legacy FamilySearch. You can also specify the number of ancestor and/or descendant generations to be downloaded, source citations, spouses of children, and duplicates checking. These persons will be added to your *current* family file.



If you want to import a tree from FamilySearch into a *new* family file, close Legacy FamilySearch and open Legacy Family Tree.

- 1. Click on **File** > **New File** to open the *Guided Startup Wizard*.
- 2. Click on **Download my family from FamilySearch**.
- 3. Click on I want to sign into FamilySearch to download what the Church has about me and my ancestors and then Next Step.
- 4. Enter a name for your new family file, then click **Save** and a *FamilySearch Login* screen appears.
- 5. Enter your user name and password and click **Login**.
- 6. Select either yourself or another person with a FamilySearch ID, set the number of generations to download and the other options you want; and then click **OK**.
- 7. When the download is finished, click the **Close** button.
- 8. Next, click the **OK** button to refresh Legacy and see the people you just downloaded.

Auto Match

This feature will try to automatically find possible matches for unmatched persons in the list with persons at FamilySearch.

- 1. It's recommended that you check mark Flag individuals that are auto matched (Auto matched individuals will have yellow arrows) so that you can easily see the results.
- 2. Click the Start button. Depending on the number of people in your file, this process can take a long time to complete.
- 3. After the Auto Matching process is done, examine your list of names for people with arrows. As you click a person, their double yellow arrows will turn red. Please go through the process of checking the people for Possible Duplicates and then Share Data, etc. as needed.
- 4. Yellow Figure means this is a provisional match; use caution. If Auto Match incorrectly

爱知 e Unlink person

matches a person (and sometimes it will), you need to unlink them using the button.

Update Matches

After you have synchronized persons in your family file with FamilySearch, their green-green arrows can change for various reasons (merging duplicate persons, global search and replace, Master List clean up, etc.). Rather than re-synchronize them one by one, you can automatically reset their arrows colors. Update Matches options are:

Check linked individuals for changes in FamilySearch
Recheck linked individuals for duplicates (This can take a long time to process)
Reset all Green-Red arrows to Green-Green (People changed in FamilySearch)
Reset all Red-Green arrows to Green-Green (People changed in Legacy)
Reset all Yellow / Red-Red arrows to Green-Green (People changed in Legacy and FamilySearch)

After check marking your options, click **Start**. When done, if the arrows for persons in the **Name List** do not appear to update, click the **Reload** button (see next topic).

Tips and Updates

The Tips and Updates screen is a live link to the Legacy News blog and show articles in a built-in browser window as they are posted to the blog. This keeps you up-to-date on what is happening in the genealogy community. You can also see the current version number of Legacy

FamilySearch and see if there are any updates available.

Help

When you have questions about using Legacy FamilySearch, the information you need is often available in the program's Help file. To access the Help system, click on <u>Help</u> and select <u>Help File...</u> in the upper left corner of Legacy FamilySearch. Next type the word 'FamilySearch' at the top of the <u>Index</u> tab. This will jump the FamilySearch section of the Help system. Highlight the topic you want and then click **Display** at the bottom of the navigation pane.

Legacy Family Tree - FamilySearch Made Easy

Please visit http://www.legacyfamilytree.com/fs.asp for additional information.

Legacy FamilySearch User Group

Did you know you can subscribe to the Legacy FamilySearch User Group (LegacyFS) for help? LegacyFS is a mailing list for our Legacy FamilySearch users to share ideas and to help each other with issues related to Legacy's FamilySearch feature. Please visit http://www.legacyfamilytree.com/LegacyLists.asp to subscribe.

How-to Questions and Troubleshooting

The answers for many Legacy FamilySearch questions and problems can be found at http://support.legacyfamilytree.com . Here are some of the commonly asked questions and problems.

Access Violation

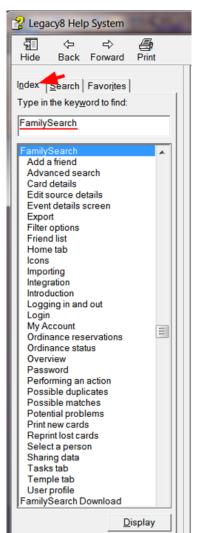
Please see the article at http://support.legacyfamilytree.com/article/AA-00530.

FamilySearch Login Problem – Error 401

- 1. Make sure you enter your user name and password correctly.
- 2. if you are using the correct user name and password and still get error 401, you may need to update your account information. Contact FamilySearch Support for help.

Cannot Combine Duplicates

Please see the article at http://support.legacyfamilytree.com/article/AA-00534.



Error merging individual. Error number 400....

- 1. Click the **Swap People** button in the lower left corner of the Merge screen.
- 2. Try the merge again. It should work this time.

How Do I Log in Using a Different Account?

- 1. Open Legacy FamilySearch and let it automatically log in under the account that it is set to open with. (If you are already in Legacy FamilySearch, start with step 3.)
- 2. Wait for Legacy FamilySearch to load the family file.
- 3. Click on **Log out** in the upper right corner of the screen.
- 4. Click on **Log in**, then enter the other person's User name and Password and click **OK**.

Legacy Family Tree not showing new downloaded data

If the new data does not appear in **Family View** in Legacy after downloading from FamilySearch, click on **Pedigree View** and then back to **Family View**. All the new information will now appear.

General Maintenance – Miscellaneous Problems

- 1. With Legacy Family Tree and Legacy FamilySearch closed, browse into C:\Program Files\Legacy8\ directory (or C:\Program Files (x86)\Legacy8\ if you have a 64-bit Windows system) and delete the FamilySearch subfolder.
- 2. Replace the FamilySearch folder by updating your Legacy program by visiting http://www.legacyfamilytree.com/DownloadUpdate.asp.
- 3. Start Legacy Family Tree and click on **File** > **File Maintenance** > **Check/Repair** and proceed with the repair. If any error messages occur during the Check/Repair process, click **No** in the error message box so that the repair steps can finish. Do Check/Repair twice if errors are found.
- 4. Start Legacy FamilySearch and click on **File** > **File Maintenance** > **Check and Repair**.
- 5. Try Legacy FamilySearch again.

How Can I Download All My Ancestors at One Time?

Make sure that you have the newest update to Legacy Family Tree downloaded and installed. This is critical because this update has import new features that let Legacy connect to the Family Tree and FamilySearch. Please visit

http://www.legacyfamilytree.com/DownloadUpdate.asp. There are two ways to download from the FamilySearch into Legacy Family Tree.

1. Creating a *new* family file by downloading your ancestors from FamilySearch Family Tree

- 1. Click on **File** > **New File** to open the Guided Startup Wizard.
- 2. Click on **Download my family from FamilySearch**.
- 3. Click on I want to sign into FamilySearch to download what the Church has about me and my ancestors and then click Next Step.
- 4. Enter a name for your new family file, then click **Save** and a FamilySearch Login screen appears.

- 5. Enter your user name and password and click **Login**.
- 6. Select either yourself or another person with a FamilySearch ID (click **Verify** to check the ID you entered), set the number of generations to download and the other options you want; and then click **OK**.
- 7. When the download is finished, click the **Close** button.
- 8. Next, click the 'OK' button to refresh Legacy and see the people you just downloaded.

2. Downloading into your current family file using Legacy FamilySearch

- 1. From Tasks in Legacy FamilySearch click the **Import Tree** button.
- 2. Select the starting person for the download. Enter his/her FamilySearch ID if needed (click **Verify** to check the ID you entered), set the number of generations to download and the other options you want; and then click **OK**.
- 3. When the download is finished, click the **Close** button.

Can I Upload a GEDCOM File to the Family Tree at FamilySearch?

Yes, but you cannot do it using Legacy FamilySearch. You will have to use Legacy Family Tree. To upload your family information, first create a GEDCOM file. Your GEDCOM file can be up to 100 MB (this is a FamilySearch limitation, not Legacy's). First, close Legacy FamilySearch. Next:

- 1. In Legacy Family Tree, click on **File** > **Export to** > **GEDCOM File**. The GEDCOM Export window appears.
- 2. In the **Produce file for:** box, select **GEDCOM 5.5. (Standard)**.
- 3. Select your export options. If you need more information, click the **Help** button.
- 4. When you are ready to export, click the **Select File Name and START EXPORT** button. Legacy will prompt you for a file name and location, and then creates the GEDCOM file for you. Pay attention to the location where you save the GEDCOM file. You will need to be able to locate it in order to upload it to the Family Tree.
- 5. If you need assistance creating a GEDCOM with Legacy please see the article "Creating a GEDCOM in Legacy" at http://support.legacyfamilytree.com/article/AA-00515.
- 6. To upload the GEDCOM you just created, please review the directions in the article "Uploading GEDCOM Files and Copying the Information to Family Tree" at https://familysearch.org/ask/productSupport#/Uploading-GEDCOM-Files-and-Copying-the-Information-to-Family-Tree.
- 7. If you need upload assistance, please contact FamilySearch (Legacy support cannot help you with FamilySearch upload issues.)