

## CUSTOMIZE

### Toolbars

Two toolbars are optionally at the top of all Legacy screens: the small, Quick Access toolbar, and the Main Toolbar with its many sub-toolbars.

- The Quick Access toolbar can be placed either above or below the main toolbar or Ribbon Tab. Click the small arrow to the right to make a choice.



- To manage the contents of the Quick Access toolbar, click Design to the right, click Toolbars, click Quick Access Toolbar. Drag and drop icons to and from the toolbar as desired. You can also drag icons to different relative positions on the toolbar.
- To hid or display the Ribbon Tab (to get more “real estate”), click on the arrow to the left of Design.
- To manage the contents of MyToolbar, display MyToolbar, click on the small arrow on the right, drag and drop icons to and from the toolbar as desired. You can also drag icons to different relative positions on the toolbar.



### RINs

Think of an RIN as being unique identifier for the individuals in your database. Names are, as we all know, not necessarily unique. You do not want Legacy to be changing these identifiers, or your notes and reports will get very confusing. The first thing you want to do is click on the Options tab, click on Customize then 4. Data defaults then 4.4 and uncheck “reuse abandoned RINs”.

Then go to 8.2 Display Numbers on Names and check On all Name Lists, On Family View and Pedigree View and the bullet for RINs.

Get used to thinking of individuals in terms of their RINs.

### QuickDup Options

As you add individuals to your database, Legacy checks for duplicates. You can set the parameters for this check. Click on Options then QuickDup. Set the parameters to fit your database.

### Colors

Click on the Options tab, click on Change Colors. Play with these all you want. Optionally, then go to to Customize then Colors 9.3 to set everything back where it began.

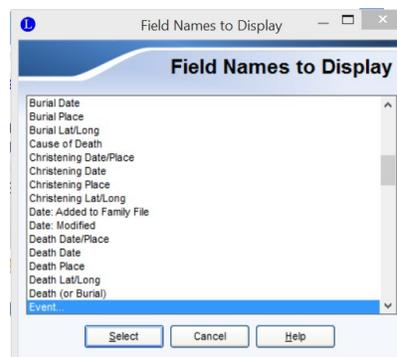
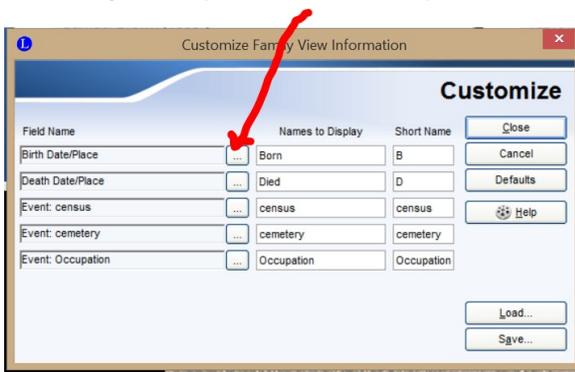
## Fonts

Click on the Options tab, click on 10.fonts. Here you can assign fonts to everything in the system, in case you have nothing better to do.

## CUSTOMIZING THE FAMILY VIEW

Note: for any object on the screen, right click on it to get a menu of possible actions.

To change information displayed for an individual: Left click on one of the labels (born, died, etc). Click on the box with three dots to get to selection screen, On the Field Names to Display screen, navigate to the field you would rather have displayed here. This will apply to all of your family view screens in all files. Personally, the most important things for me when looking at the family view are: Birth date/place, Death date/place, Census date/place, Cemetery date/place and Occupation. You may well have a different work flow.

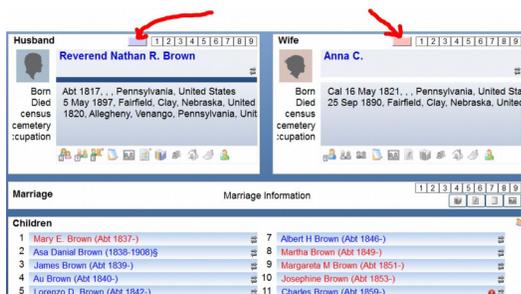


To change other information, click on the Options tab then Customize then 8. View, where you will find a list of possible customizations for the Family View. Note: “ff” indicates setting applies to current file only; “gbl” indicates setting applies to all your files.

### 8.1 Birth and Death Years on Names

### 8.2 Display numbers on names (described above)

8.3 refers to a scheme where your ancestors are color coded to show if they are maternal or paternal ancestors. To activate this feature, navigate to your entry in the database (or whomever you want the color coding to refer to). Then click on the Tools tab then Set Ancestor Colors. Note you can track 4 grandparents' lines with four colors for two individuals, perhaps you and your spouse., or you can track 8 great grandparents' lines with 8 colors. Click on Reset Colors to see how this works. After you set this option, AND APPLY IT, the colors show up on various screens.



8.4 Use Short Location Names on Screens. Personally, I don't use short location names.

8.5 Each marriage can have up to 60 children. The children are displayed in the child list, in one, two, or three columns at a time. You can change the setting by right-clicking on a child's name, go to View and then choosing **1**, **2**, **3** columns or Best Fit.

To change to the grid format, right-click on any child's name, then View then Scrolling List (grid). You can also display the children in a grid list which includes other information columns like Sex, Birth date and location, and Death date and location. You can select from a list of available columns to display by right-clicking on any column heading.

To include half-siblings in the children list, check the box here. I see no reason NOT to check this box.

By default, the male children are displayed in blue and the female children in black. To change these colors, go to Options to Change Colors. Click on any child's name, and set the colors.

8.6 You might, for some reason, like to see shadow boxes around items in the view.

8.7 Default Family View Labels and Report Wording lets you report relationships in a way politically acceptable to those you are reporting to.

8.8 Master Location List Style. This is changeable when you are looking at the master location list.

8.9 Picture of Main Person. This has more to do with reporting than the Family View.

8.10 Show Status on Family View. No clue.

8.11 Monitor Potential Problems

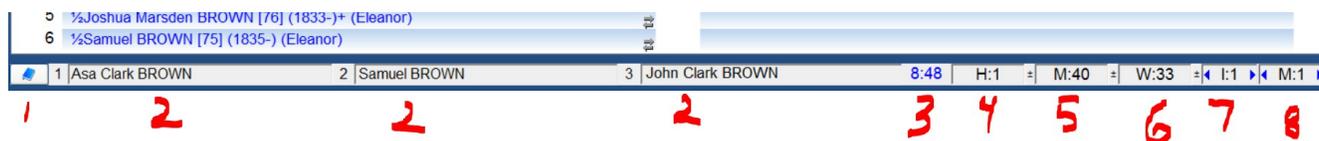


Potential problems can be a problem, but you are in control.

- You can turn them all off at 8.11.
- You can turn them off for specific events. Cemetery or Burial, which usually comes after a death, come to mind. Click on the View tab on the Ribbon bar, click on Master Lists then the down arrow to the right, click on Event Definition, double click on the event you want to exclude, click on Exclude from Potential Problems Report.
- You can exclude a specific problem: Holding down the Ctrl key while left-clicking on the icon, displays the Potential Problems window. Click on Mark as Not a Problem.

8.12 Aunt, Uncle, Niece, Nephew Terms. Actually, should be covered in the sentence definition discussion.

ASIDE: What are those things at the bottom of Family View?



1. Bookmark List. To Set a Bookmark: On the *Family*, *Pedigree*, *Descendant*, or *Index View*, make sure the person from whom you want to set a bookmark is current and then right-click on the Bookmark button in the lower-left corner of the window. The person and his or her displayed spouse (or Preferred spouse if on the *Descendant* or *Index* tabs) are added to the *Bookmark List*. To Jump to a Bookmark: Click on the bookmark icon, click on the desired couple and then click the Go button below the list. You can also just double-click on the couple's names in the list.

2. Quick Bookmark. To Set a Quick Bookmark: Make sure the person you want to put the bookmark on is highlighted and then right-click inside any of the three boxes. The name appears in the box. To Jump to a Quick Bookmark: Click on the desired name in the Quick Bookmark box. That person is displayed along with the spouse that was showing when the Quick Bookmark was set.

3. Alarm. Tells the current time. Left click on this icon to set an alarm that will tell you it is time to quit working and go to bed.

4. Husband's RIN. Right click arrow to the right to go to the next male RIN, left click the arrow to go to the previous RIN. Right click the H: field to go directly to a different RIN.

5. Marriage MRIN. I have not found any place to find the MRIN, so this doesn't help me much.

6. Wife's RIN. Works the same as the Husband's RIN.

7. Use to scroll through all individuals with a specific tag. Right click to choose a specific tag. Use arrows to left and right to scroll through the list.

8. Same as 7, but for all marriages with a specific tag.

ASIDE: What is that icon at the top of the children list?



Left click on that to get a list of children, where you can add, delete, unlink, modify any child. If

you want to track a specific branch of the tree, set the [Preferred Child](#) here.

Other customizations in [Customize](#):

3.8 Child List Indicators: check bullet of [Use § and + at the end of names to indicate spouses and continued lines](#). Check the [Indicate Preferred children in Child List](#) to show preferred child with leading \*. Mark preferred child as described above.

ASIDE: What do the Little Symbols Mean?

A "+" at the end of a parent names means that person has parents. There is at least one more generation of ancestors on that line.

A "+" at the end of a child name means that person has children. There is at least one more generation of descendants on that line.

A "§" at the end of a child means that person is married but has no children.

An "!" at the end of a child means that person never married and never had any children. (The checkbox is checked for [This individual has no relationships and no children](#) on the *Information* screen.)

A "»" at the end of the Husband or Wife label means that person has excluded potential problems selected.

If the Husband or Wife label is red, or whatever you have set the Living Indicator [color](#) to be in [Data Format 3.9](#), it means that person is marked as Living.

A "½" at the beginning of a child's name means that person is a half-sibling to the children of the current husband and wife. (A half-sibling only has the husband OR the wife as a parent, not both of them. The other parent is from a previous marriage.) See [8.5 Include half-siblings in the list](#).

When FamilySearch integration is turned on, small icons appear at the end of the names on the *Family* and *Pedigree Views* to show if that person's information is synchronized with the information in FamilySearch. These icons change to indicate the status of synchronization and temple work completion.

ASIDE: What you can't see! Modified Date: Legacy keeps track of whenever an individual is added to the Family File and whenever an individual's information is changed. The date of the newest change to either of the current individuals is displayed in a tooltip at the bottom-right corner of the Legacy screen when you hover your mouse cursor over the area. To see the full details, click on the box that shows up when you are hovering. The *Last Modified* window appears showing the date and time of last individual or marriage modification as well as the date and time of when the records were originally added.