

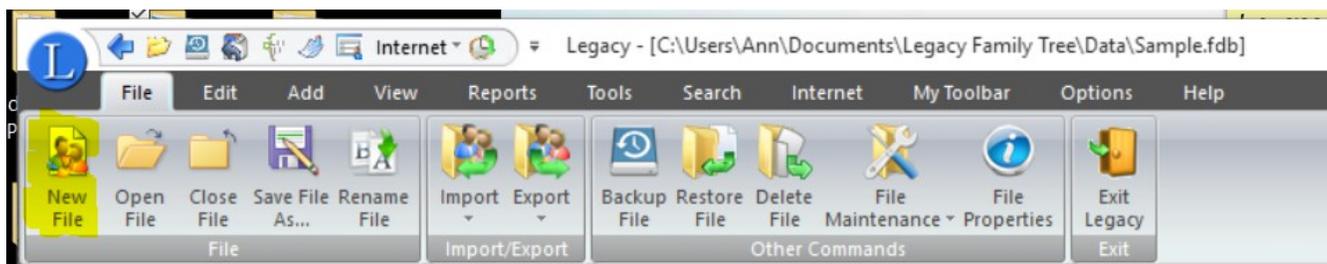
# Working with files in Legacy

Things you need to know about files to use Legacy:

- how to create a new Family
- how to choose a Family work with
- how to import a Family
- how to export a Family
- how to maintain Family files
- how to compare Families
- how to merge Families
- how to manage media

## Creating a new family

Legacy groups its files into Family Files. The first one you encounter when you start using Legacy is the Sample family file. You have, since then, added your own file to collect your own data. If you are like me, you have several family files, one for your mother's line, one for your father's line, one for your spouse's line, etc.



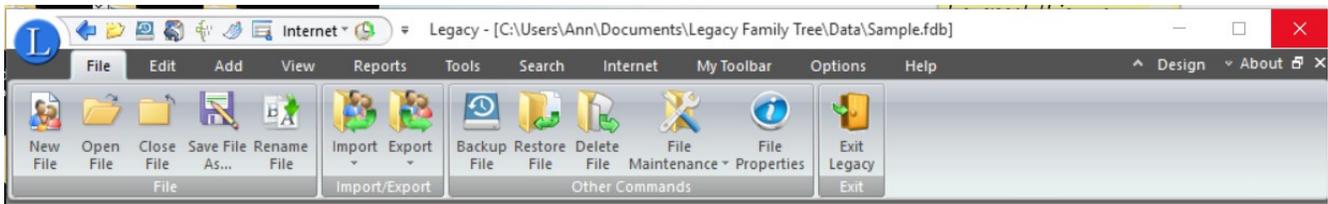
Click on the File tab, then on New File



As you can see, there are several options as to how to create a new Family. Those options are discussed in the rest of this document. To create a new Family database, click the first button and follow the instructions.

## Choosing a Family to work with

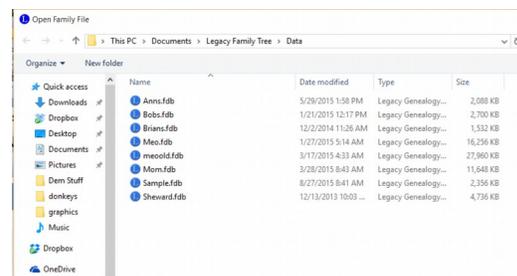
When you start up the Legacy software, it will display the family file you last worked with, but you have the option to go to any one of the families you have created.



*Click on the File tab, then the Open File icon*



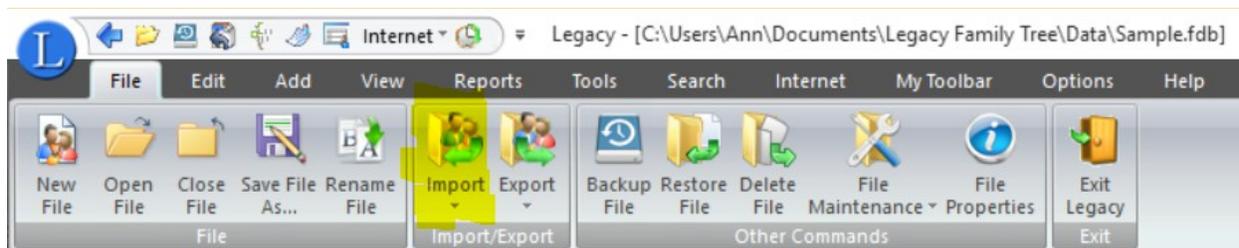
*Unless you have hopelessly lost your family, click on Select the file*



*Click on the family you want to work on*

## Importing a Family

If someone has sent you a Family file to get started with, they will tell you what format that file is in. Usually, the file will be a GEDCOM file, but sometimes it will be another format.



*Click on the File tab, then on Import, then choose the file format of the Family you want to import. If you have trouble, choose the Import Wizard.*

## Exporting a Family

You export a Family by creating a file and sending it, via email or Dropbox or flash drive or whatever means you have.

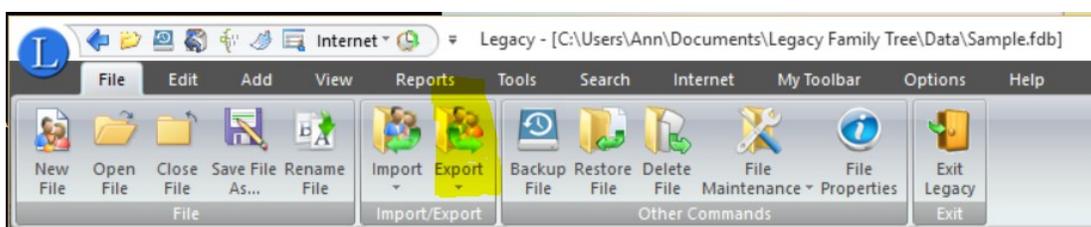
You can export

- an entire Family,
- parts of that family. For example, you might just want to export the direct descendants of a specific individual. Tag those individuals using the tagging facility of Legacy. That is a topic of another discussion.

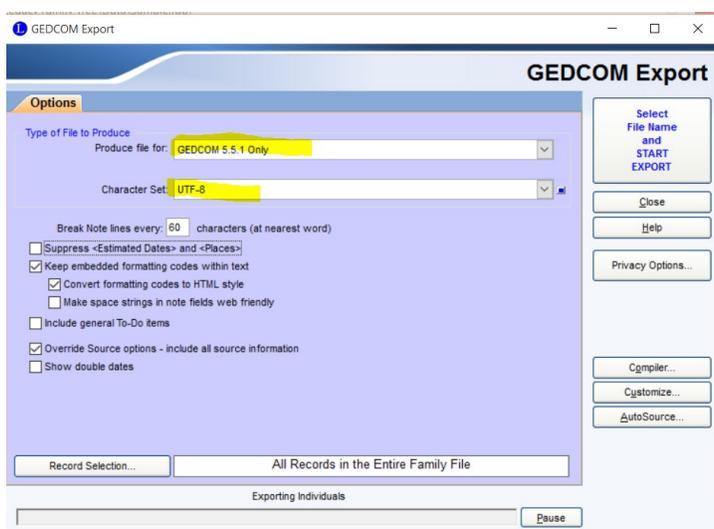
Once you have chosen the part of your Family you would like to export, you can export

- to another Legacy user by exporting a Legacy set of files.
- to someone not using Legacy by exporting a GEDCOM file

## Creating a GEDCOM file



*Click on the File tab, then on Export. Choose the GEDCOM option*



*Set the options, then click on Record Selections or All Records. Wait for file creation to complete.*

The safe choice on file formats is the GEDCOM 5.5.1 format, as defined by LDS and which has been in use for many years.

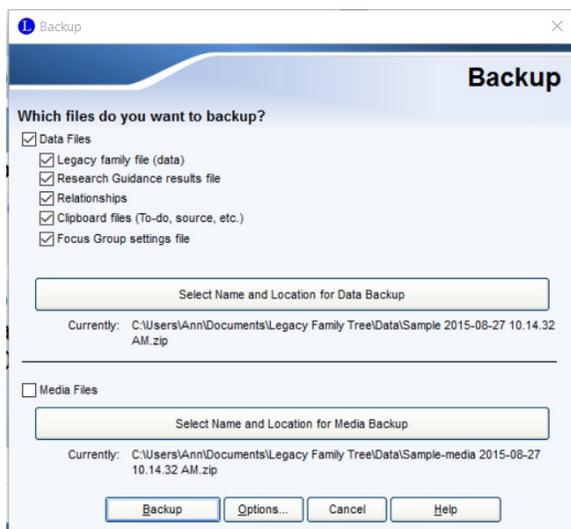
UTF-8 is a coding system that allows for the greatest variety of symbols, and should cover any kind of comments you might have in your database.

The options on the right are important, especially the Privacy Options. Click on those buttons and follow instructions

Leave the rest of the options unless they mean something to you.

# Maintaining files

## Backing up your files



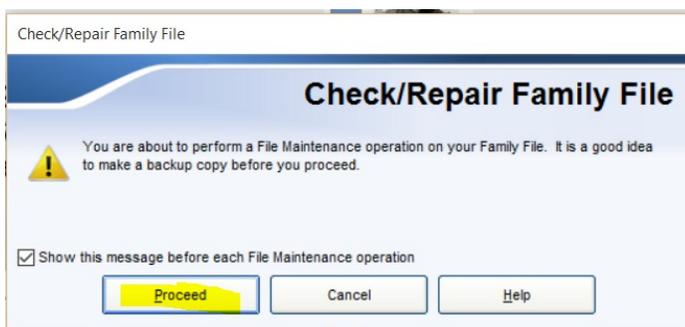
You should do this early, do it often. A lot of effort goes into finding and collecting genealogical data. You really don't want to have to repeat that effort! The default location is on your C drive, but it is much better to back up to an external disk drive or, better yet, to the cloud.

If you have collected media, don't forget to back that up as well.

The options button allows you to add dates to the name of your backup files, which would help you keep track of them.

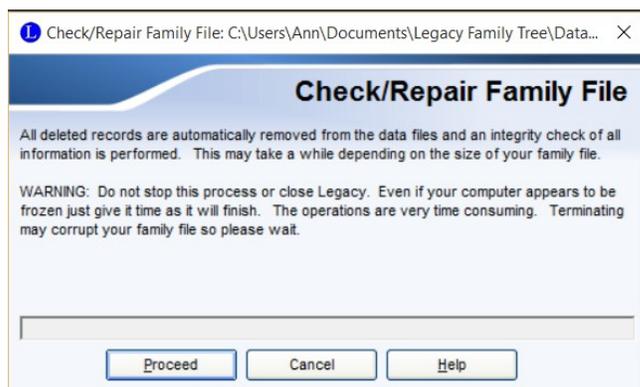
You need to decide how and when to weed out backup files. They take up space, but that isn't as important as it once was.

## File Maintenance



Each of the maintenance selections starts with a warning that you are about to change your master files. Keep going to see what your options are. But read the option box before you proceed!

## Check/Repair



## Removing Deleted Records

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 information, making the room available

for other additions, select this option. Legacy will go through the file and

compress out all records that are not referenced. It also checks all data integrity within the Family File.

### Sort Events and Facts

You can have Legacy sort all of your individual and marriage events and facts into date order while the Check and Repair is being done by selecting the **Sort all events by date** option.

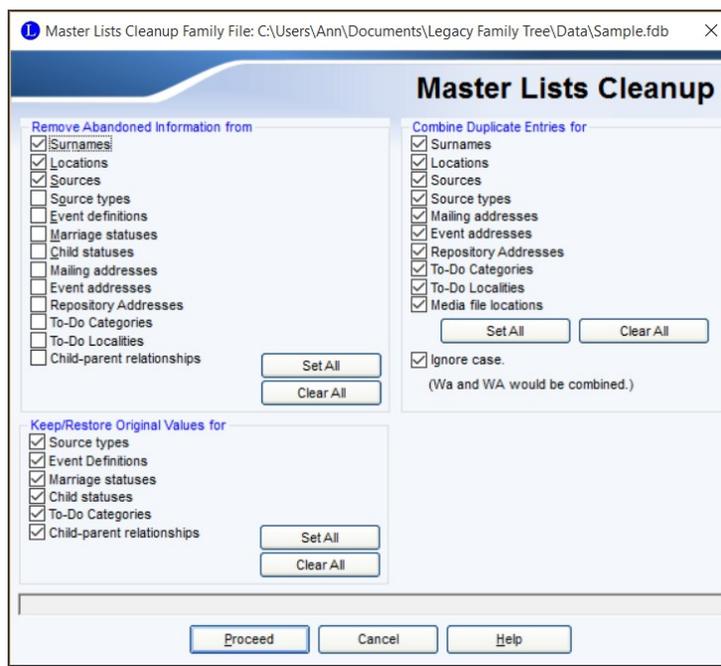
### Integrity Check

Legacy runs through your family file and checks the integrity of all the links to ensure that there are no pointers to deleted records.

### Error Log

All actions taken during the verifying process are recorded in a text file named ERROR.LOG in the [My Documents]\Legacy Family Tree\\_AppData\Log folder. This file can be viewed with any text editor or word processor.

## List Cleanup



### Remove Abandoned Information

You can have unused entries removed from any or all of the master lists maintained by Legacy. For example, abandoned entries can happen in the *Surname List* if you were to delete all the people with a certain surname from the family file. That surname would still remain in the master list as an unreferenced name. You can have Legacy run through the *Surname List* to remove any names that are not being

*You can clean up as many lists as you want*

pointed to. This is most often the case if you entered a misspelled name and then later corrected it. "Smiht" could end up in the list, taking up room, and never be referenced.

### To remove abandoned information from lists:

1. Select the lists you want to clean up by clicking on the checkbox next

to each list name. (You can select all the lists by clicking **Set All.**)

### Keep/Restore Original Values

Legacy starts with a few built-in lists. These include common *Source Types*, *Event Definitions*, *Marriage Statuses*, *Child Statuses*, *To-Do Categories*, and *Temple Names*. When purging unused items from master lists, you may want to keep the original default entries even though they have not been used yet.

### Combining Duplicate Entries

While cleaning up the master lists in your family file you can have any duplicate entries combined into one. This does not mean duplicate individuals; it means duplicate sources, locations, etc.

### Compact Family File

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 information, select this option. Legacy goes through the file and compresses out all records that are not referenced, making your family file smaller.

## Comparing Families



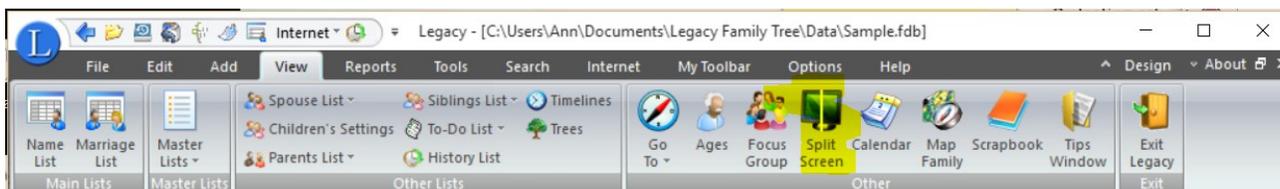
*Click on Tools, then Compare Two Files*

This tool will take you to the Duplicates routine, but instead of checking for duplicates within a family, it will check for duplicates between the file you are currently viewing and another you choose from your list of Families. As you find duplicates, you will be given the option to tag them in either file or in both.

Since you initiated the Compare Files routine, you should have some idea of what you want to do with the tagged individuals.

## Merging families (Split Screen View)

You can have several families, each with its own set of files. Normally, you work on them one at a time, but it is also possible to show them side by side to drag and drop individuals from one to the other. If you do this, Legacy will check to see if you are creating possible duplicates.



Click on View then on Split Screen



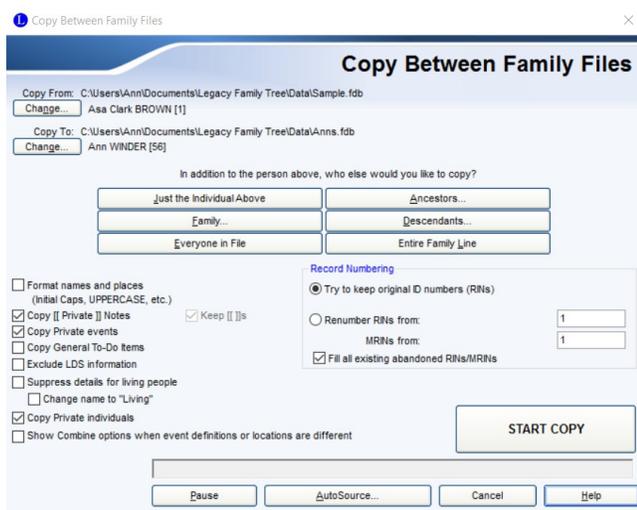
Here you have the option of looking at

- two different parts of the file you were working on or
- two different family files.

Follow the directions for each choice.

Now you work with one file at a time, but you can see both of them. The active file is the highlighted one. Navigate in this file as you would if there were only one file.

If you are comparing two different files, and you intend to follow the directions below, be sure to back up your files before you begin!



If you are comparing two different files, you are likely to find an individual in one file that you want to add to the other. With both files showing the family view, click on the individual you want to copy over, then drag him over to the second file. The copy will not happen at that time. Instead you will be shown the Copy Between Family Files screen.



Pay attention to these statistics. If you have chosen the wrong options above, this will be your first clue. If it doesn't look right, you can choose the Undo Import from the Tools tab of the Ribbon Bar



*To undo an import, click on the Tools tab, then on Undo Import*

After you press OK, Legacy will take you to the Duplicates routine, to discover any overlaps between the two files. This is a topic for another document.

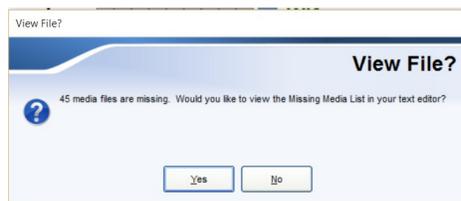
To go back to a single file view, click on the x in the righthand corner of the file you want to close.

## Managing media

If you are like me, you tend to move files around. For example, I just moved all my photos to Dropbox. And guess what...Legacy couldn't find them anymore! Legacy can help.



*Click on Tools then on Media Relinker*

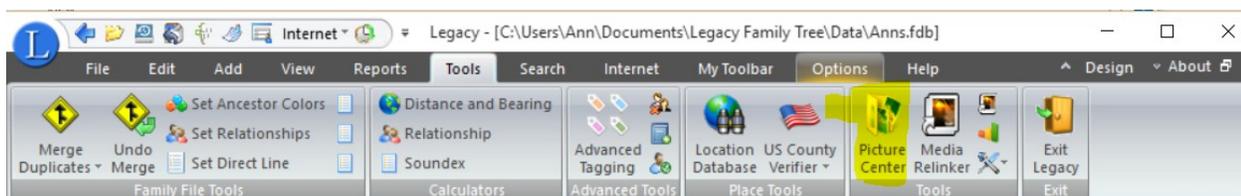


*Click on Yes to get a list of missing media*

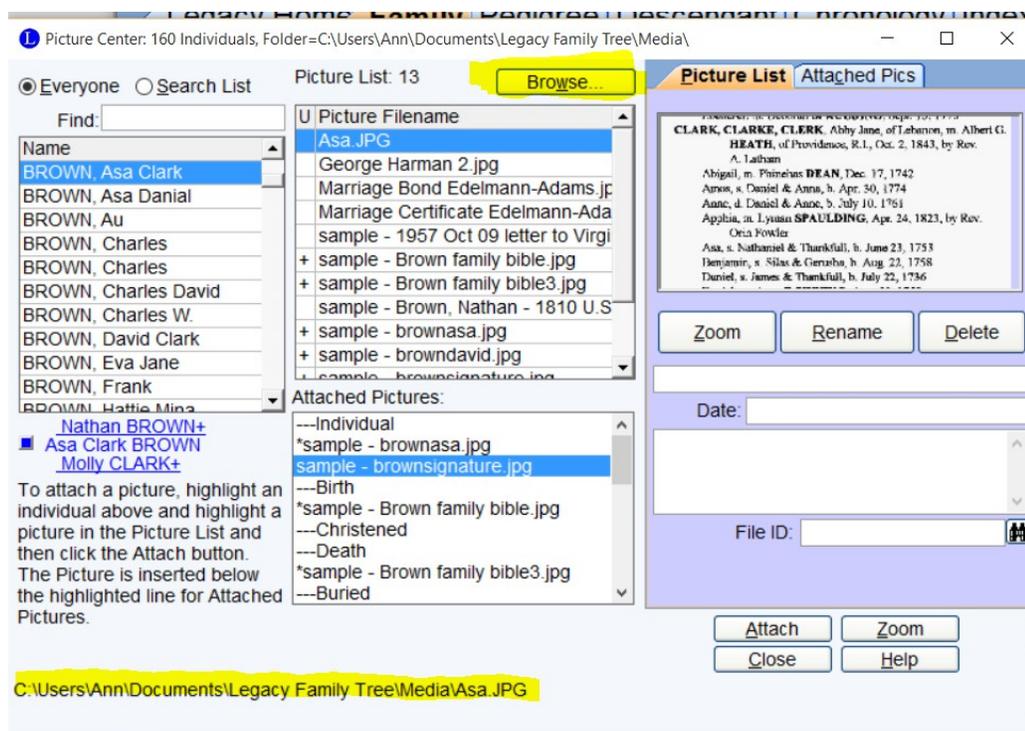


*Click on Relink my Media to have Legacy find the files*

You can optionally use the list to chase down and attach the missing files yourself.



Click on Tools then on Picture Center



Point Legacy to the folder you have media in.

On the left is a list of all the individuals in your family file. In the middle is a list of the pictures on your computer in the file you have pointed to. Click on the Attached Pics tab on the right to see the highlighted picture.

To attach a particular picture to a specific individual:

1. Highlight the individual in the left window.
2. Find and highlight the desired picture in the upper-center window.
3. Click the **Attach** button near the lower-right corner. This will add the picture to the individual's picture list.