

Citing the Sources of Your Information – Legacy Family Tree

When doing genealogy work, you should keep track of each piece of information you collect and also where you found it. Your records should be detailed enough so that any other person in the future could find the same information and possibly expand on it.

As you add individuals and families to the Family File, you can either document the sources of the information as you go or you can return later and add the documentation. Of course, by putting things off you tend to forget about them, so it is strongly suggested that you resist the urge to save time and go ahead with documenting your sources as you initially enter the names.

Assigned Sources Form

When you click the **Sources** icon from the *Individual Information* screen, the *Assigned Sources* window appears. This form shows all the sources that have been assigned to the various pieces of information for the current individual. This includes an *Unspecified* source, which applies to the individual as a whole, and specific source assignments that have been made to each event for the individual. Also included are any sources assigned to any marriages for the current person.

As you scroll up and down in the list, the full information of each master source and its individual detail is displayed in the bottom half of the window. The **Output** tab shows how the source will look when cited on a report. The next three tabs, **Text/Comments**, **Repository**, and **Pictures** show other information about the source.

You can filter the list to just show the events that have had a source attached to them by unchecking the **Show All Events** checkbox. Checking the box returns the display showing all events.

Adding a Source from the Master Source List

All main source information is kept in the *Master Source List*. Often a single source will contain many pieces of information that apply to many different people. Rather than record all the information for a source location for each fact that it contains, Legacy just points each fact to its source in the master list and lets you record specific details about it, like the page numbers, microfilm item, etc.

To make a link between the piece of information you are documenting and a source in the master list, place the cursor on the desired event by clicking anywhere on the line in the grid and then click **Cite a Master Source**. The *Master Source List* window appears containing all the sources currently defined for this Family File. To select a particular source, highlight the line and click **Select**, or double-click the line. You are then prompted for the Detail information that applies to the current person. This is usually the page number where the information was found within the source record. It may also include an item number of a microfilm roll or a page and line number of a census record. After filling in the Detail, (which can be left blank), you are returned to the *Assigned Sources* window with the citation in the proper place.

You can add as many source citations to each piece of information as you want to.

Adding a New Source

To add an entirely new source, one that is not in the *Master Source List* yet, click **Add a NEW Source...** The *Add Master Source Definition* window appears. Fill in the new source information fields and click **Save**. The new source is then added to the *Master Source List*. See *Defining or Editing a Master Source* for more information. . You are then prompted for the Detail information that applies to the current person. This is usually the page number where the information was found within the source record.

Source Detail

Sources recorded in the *Master Source List* are general locations and do not contain specific page numbers or item numbers. These are recorded in the *Source Detail* that is associated with each source citation. See Source Detail for more information.

Editing the Source Detail

To make changes to the source detail information, place the cursor on the desired line and click **Edit Detail**. The *Source Detail* window appears where you can specify the exact location within a source where the information was found. This is usually a page, page range, item number, plot number, etc. See Source Detail for more information.

Editing a Source Citation

Once in a while you might find that you need to change a master source entry because of a typing error or because of misinformation. To change an entry, highlight the line and click **Edit Source**. The *Edit Master Source Definition* window appears where you can make changes. When you save the changes, Legacy informs you that you have changed a master source and asks if you would like to "**1. Apply the changes to all references to the original Master Source**" or "**2. Create a new Master Source from the changes for this Event.**" Indicate your choice by clicking the corresponding button. See Changing a Master Source for more information.

Removing a Source Citation

You can remove a source citation from any event in the list by placing the cursor on the source line you want to erase, and clicking **Remove**.

Show All Events or Just Some

You can collapse the *Assigned Sources* list to just show those events that have a source citation attached to them by unchecking the **Show all Events** checkbox. The list can be restored to show all the events by checking the box. This option is reset each time you open the list - meaning the Show all Events checkbox is always checked when reopen it. (This is so people don't think they have lost all their sources when they see a completely empty window and have forgotten they unchecked the option.)

Verifying Your Source Citations

When you are entering information into your family file and documenting where the information came from, you generally know if the sources are valid or not. However, if you import information that other people have put together, you have not had a chance to check out the sources. It is advisable to do so. The **Verified** column on the *Assigned Sources List* is used to mark the source citations you have confirmed and is a good way to keep track of your progress in making sure you have reliable documentation for all of your information.

To put a checkmark in the **Verified** column, simply click in the empty box in the "**V**" column for the appropriate citation. (There is also a **Verified** column for *Master Sources* that is used for the same purpose, to verify the validity of each master source.)

Zooming the Grid

If you would like to have the type in the grid list made larger or smaller, click **Zoom**. The *Grid Font Size* window appears where you can select a different type size. When you return, the list will redisplay in the new size. See Zooming Grids for more information.

Rearranging the Source Citations

You can change the order of the source citation for a specific event by placing the cursor on the source line you want to move and then clicking the **up** or **down** arrow near the lower left corner of the list.

Using the Source Clipboard

The *Source Clipboard* is a feature in Legacy that can tremendously increase the efficiency with which you document the sources of the information you enter into your Family File. See Source Clipboard for information on how and why to use this feature.

Quick Copy Existing Citations to the Source Clipboard

You can copy the source citation you have showing for the current individual onto the *Source*

Clipboard by clicking  in the lower-left corner of the screen. When you do, if there is already a source on the clipboard, Legacy asks if you want to **Copy/Overwrite Existing** the entry.

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