

# VicFamilies

## USING LEGACY TO EXTRACT THE DATA

Bruce Tweedley

This article gives *Legacy* users step by step instructions of the search procedure used to produce a basic 'csv' file of people in their Family File with a presence in Victoria and who are not living. Following the procedure there are notes of some refinements you may wish to use. Then follows the procedure for producing the 'csv' file. The whole procedure has been based on Legacy Deluxe Version 5 or 6 and is designed to be carried out in one continuous session. It is written for those who need a step by step procedure.

For background information regarding the 'VicFamilies Research Directory' refer to Linley Hooper's article in *Ancestor*, December 2004, page three.

You can use any or all of the search components listed. At any time you can produce a new file to send to Linley and it will replace the existing one.

To create the file, it is important that you are consistent when entering locations in your database and you must have the word Victoria, or an abbreviation, eg Vic, within your location field to be able to search for it, not both.

The words contained in the procedure in "..." are what you look for on the screen.

READ THE WHOLE PROCEDURE BEFORE YOU START.

### THE SEARCH PROCEDURE

Open Legacy.

Have yourself as the highlighted person in Family View (important if you want to have only people in the list who are related to you as described later).

Click on 'Search' at the top of the screen, click 'Find' (or click the Search Icon if you have it displayed).

Click on the tab labelled 'Detail Search' at the top of the window, then, referring to Fig 1:

1. Under 'Look for whom?' click 'Individual' (use the arrow to the right and scroll to find it).

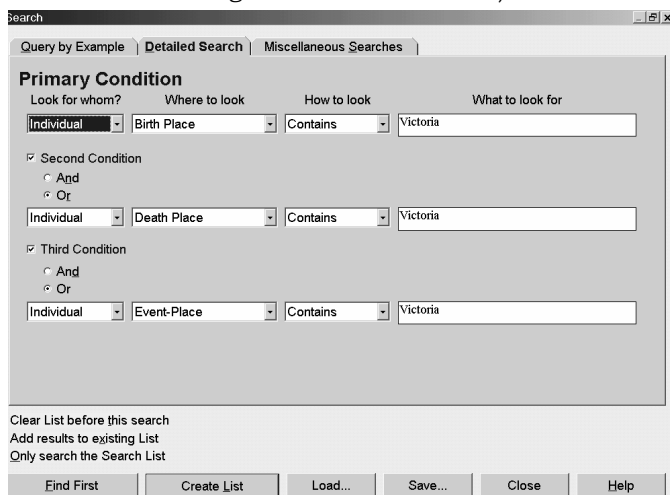
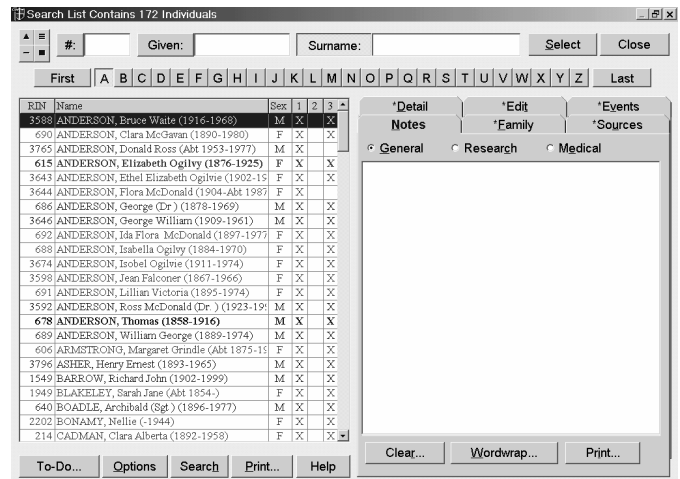


Fig 1: The Search Screen

Fig 2: Search List Screen



2. Under 'Where to look' click 'Birth Place'.
3. Under 'How to look' click 'Contains'.
4. Under 'What to look for' type in Victoria. (Or if you use an abbreviation use it, eg Vic.)

Tick 'Second Condition' and select 'or'.

Repeat Items 1, 2, 3 and 4 using 'Individual', 'Death Place', 'Contains', and type in Victoria.

Tick 'Third Condition' and select 'or'.

Repeat Items 1, 2, 3 and 4 using 'Individual', 'Event Place', 'Contains', and type in Victoria.

**IMPORTANT:** now select 'Clear list before this search'.

Click on 'Create list' at the bottom of the window.

You should now have a list of records that reflect the above search conditions and will look similar to Fig 2.

If you have AKAs (alternative names) showing and do not want to include them in your list, turn them off now. To do this, click on 'Options' at the bottom of the window and click on 'Include Alternative Names'. This will remove the tick that is there and the alternative names will be removed from the list. If you want to get them back again later, click on 'Include Alternative Names' and they will return.

Now click on 'Search' at the bottom of the window then click on 'Find', this returns you to 'Detail Search' in the 'Search' window.

Repeat Items 1, 2, 3, and 4 using 'Marriage', 'Marriage Place', 'Contains', and type in Victoria.

Tick 'Second Condition' and select 'or'.

Repeat Items 1, 2, 3, and 4 using 'Individual', 'Chr Place' (Christening Place or Baptism Place if you use it), 'Contains', and type in Victoria.

Tick 'Third Condition' and select 'or'.

Repeat Items 1, 2, 3 and 4 using 'Individual', 'Burial Place', 'Contains', and type in Victoria'.

**IMPORTANT:** now select 'Add results to existing list'.

Click on 'Create list' at the bottom of the window.

Now click on 'Search' at the bottom of the window and click on 'Find' which takes you back to the 'Detail Search' window.

Repeat Items 1, 2, 3 and 4 using 'Individual', 'Living', 'Equal to', 'No'.

If you are not sure whether you have your living people correctly marked in your database you could use 'Individual', 'Birth Date', 'Before', and type in 1910 (or some other date). Depending on your database this may exclude some individuals you would like to include.

Remove the tick from 'Second Condition' (this will also remove the tick from 'Third Condition').

**IMPORTANT:** select 'Only search the search list'.

Click on 'Create list' at the bottom of the window.

You should now have a list of people who are in your Legacy Family File who had any connection with Victoria and there should be no living people in the list. Look through the list and see if this is so.

There may be some individuals in the list who for various reasons you do not wish to make public. The notes that follow will remove certain categories of people from the list or you can delete them manually one at a time in the next phase, producing the 'csv' file.

DO NOT DELETE THEM FROM THE LIST YOU JUST CREATED AS THIS REMOVES THEM FROM YOUR DATABASE.

## NOTES

Continue with Note 1 and/or 2 if you choose, otherwise, proceed to producing the 'csv' file.

### NOTE 1

You may only want to have people related to you in the list, if so, have yourself as the selected person on the 'Family View' as mentioned previously.

Then with the created list still on the screen, go to 'Search' at the bottom of the window then click 'Find'. This returns you to 'Detailed Search' now repeat Items 1, 2, 3 and 4 using 'Individual', 'Relationship', 'Equal to', 'Related'. This will give you only the people in your list who are related to you.

**IMPORTANT:** select 'Only search the Search List'.

Click on 'Create list' at the bottom of the window.

### NOTE 2

If at the end of the search you find there are a number of people with the same surname in the created list that you do not want to include, you can again click 'Search' then 'Find' and repeat Items 1, 2, 3 and 4

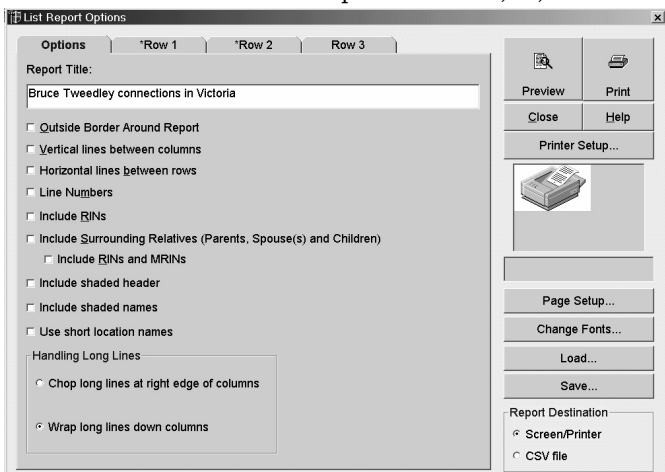
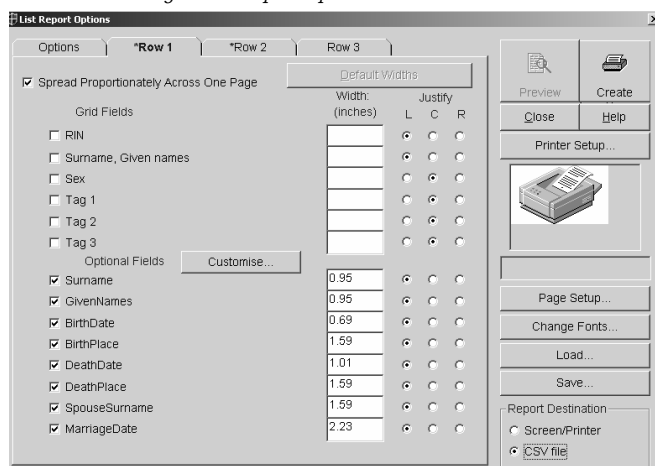


Fig 3: List Report Options Screen

Fig 4: List Report Options Screen – Row 1



outlined above using 'Individual', 'Surname', 'Not Equal to', and type in the surname you wish to exclude.

**IMPORTANT:** select 'Only search the Search List'.

Click on 'Create list' at the bottom of the window.

You can repeat this for different surnames you wish to remove from the list.

## PRODUCING THE '.CSV' FILE

Now with the created list still on the screen.

Click on 'Print' at the bottom of the window.

In the window that appears, click on 'Options' on the tab at the top of the window, refer Fig 3.

Type in a 'Report Title' if you wish eg. (your name) connections in Victoria.

For this exercise, remove any ticks that are present by clicking on the appropriate square.

Put a dot in 'Wrap long lines down columns'.

Now click on the tab at the top of the window marked 'Row 1', refer Fig 4.

Tick 'Spread Proportionally Across One Page'.

Remove all ticks under 'Grid Fields'.

Click on the word 'Customise'. (If another small window appears click 'Customise'.) You should now have a screen that will enable you to format the report as required by Linley. To do this, refer Fig 5.

Click on the top square that has three dots in it.

From the list that appears, scroll down and choose 'Name: Surname', click on it then click 'Select'. This takes you back to the 'Custom Display' screen and the word 'Surname' will appear in both the 'Field Name' and 'Long Name to Display' columns.

Then work your way down the squares one at a time choosing in the following order. 'Name: Given Names', 'Select', change the word 'Given' to 'GivenNames' (no space between words);

Then 'Birth Date', 'Select', change the word 'BirthDt' to 'BirthDate';

Then 'Birth Place', 'Select', change the word 'BirthPl' to 'BirthPlace';

Then 'Death Date', 'Select', change the word 'DthDt' to 'DeathDate';

Fig 5 – Customise Display

| Field Name                 | Long Name to Display |
|----------------------------|----------------------|
| Surname                    | Surname              |
| Given names                | GivenNames           |
| Birth Date                 | BirthDate            |
| Birth Place                | BirthPlace           |
| Death Date                 | DeathDate            |
| Death Place                | DeathPlace           |
| Marriage: 1st, Spouse Name | SpouseSurname        |
| Marriage: 1st, Date/Place  | MarriageDate         |

Then 'Death Place', 'Select', change the word 'DthPl' to 'DeathPlace';

Then 'Marriage: 1st, Spouse Name' 'Select', change the word 'Spouse1' to 'SpouseSurname';

Then 'Marriage: 1st Date/Place', 'Select', change the word 'Marr1' to 'MarriageDate'. (Legacy doesn't allow the Marriage Date and Place to be separated at this stage).

Click 'Close'.

This returns you to the 'Row 1' screen, now place a tick in each square opposite the 'Optional Fields' titles you have just created.

Now click 'Row 2' and place a tick in 'Include Row 2 on the Report'.

Tick 'Spread Proportionately Across One Page'.

Click on 'Select Fields for Row 2' then click 'Customise' (if it appears)

Click in the first square that has 3 dots.

In the list that appears, scroll down to 'Burial Date' and click on it, then click 'Select' change the word 'BurDt' to 'BurialDate' (if you wish to include it).

Click on the next square down with 3 dots and repeat using 'Burial Place' and change the word 'BurPl' to 'BurialPlace'.

Click 'Close'.

Place a tick in the squares opposite the names you have just created.

Now select 'CSV File' at the bottom right hand corner of the window.

Click 'Create' at the top right hand corner of the window.

The picture of the printer will start working and a window will appear asking where you want to save the file being created and what you wish to name it.

You could save it in 'My Documents' and you could call it (type in your surname) gsv. The program will add the extension '.csv'.

Click 'Save'. The file will be created, indicated by a blue line passing across the rectangle below the picture of the printer. A note will appear to say the 'csv file has been created'.

Now exit from the various windows and close Legacy.

If you have and are comfortable with 'MS Excel' you could open the file there, but this will require more explanation to correct some date formats, so instead, go to 'Word Pad' and open it from there. To get to 'Word Pad' go to Start/Programs/Accessories/Word Pad. A blank screen will open. Go to File/Open/Look in, navigate to the place where you saved the file (use the down arrow at the right and scroll down to find it). In 'Type of File' use the down arrow at the right, scroll down and choose 'All Documents', scroll across to find your file and double click on it and your file will open.

The file will appear as many lines of text with the words enclosed in "..." and separated by commas and no spaces.

It will look similar to Fig 6.

Look down the surnames and see if you want them included. If not, highlight the whole line of the one you want to remove and press 'Delete'.

If the word Australia is included in the place names, this is not required by Linley. To remove it go to 'Edit' (at the top of the screen), click 'Replace', in 'Find what', type in how the word Australia appears on your screen (in this case it is comma space Australia). For example ' , Australia', in 'Replace with' leave blank, click on 'Replace all'. The word Australia has now been removed from your file.

The top line of the file will contain the headings you previously set. If the line is very long you may have to scroll across to see it all, or it may have formed a second line, depending how your computer is set up.

Now at the end of the first line that contains the headings, type in the following, starting with a comma and no spaces: ',Submitter','Contact','DateSubmitted'.

At the end of the next line that has your first surname entry, starting with a comma, type in: 'your name','your email or postal address','the date the file was prepared'. Linley will automatically add this information to the rest of the entries in the file.

Now save the file and email it to <libraryadmin@gsv.org.au>. Alternatively, save it to a 3.5" floppy disk and post it to Linley at the GSV.

When your file is added to the 'VicFamilies Research Directory' it will be accessible on the GSV website at [www.gsv.org.au](http://www.gsv.org.au): go to Search/VicFamilies Database and check your entries and while there search for other records that interest you. Good Luck! 🍀

Fig 6 : csv File