LEGACY FAMILY TREE 9 –
UNLOCKED!

TECHNIQUES, TIPS AND
STEP-BY-STEPS FOR USING
LEGACY FAMILY TREE
TO RECORD YOUR GENEALOGY

BASED ON THE POPULAR
WATCH GEOFF LIVE!
WEBINAR SERIES

Geoffrey D. Rasmussen

2016

Middleton, Idaho
Geoffrey D. Rasmussen is the father of four budding genealogists. He graduated with a degree in Genealogy and Family History from Brigham Young University and has served as director and vice-president of the Utah Genealogical Association. He is a dynamic genealogy speaker on all forms of genealogy technology, and as host of the Legacy Family Tree webinar series, has spoken virtually to nearly 100 different countries. He received RootsTech’s Distinguished Presenter Award in Salt Lake City. He has authored books, videos, articles, and websites, and develops the Legacy Family Tree software program. On a personal note, Geoff enjoys playing the piano, organ, cello and basketball. His favorite places are cemeteries, the ocean, and hanging out with other genealogists.

He met and proposed to his wife in a Family History Center.

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Contents at a Glance

Preface .................................................................................................................................................... 11
Chapter 1 – Your First Few Legacy Tips .......................................................................................... 27
Chapter 2 – Adding an Online Document ....................................................................................... 35
Chapter 3 – Adding a Census Record .............................................................................................. 67
Chapter 4 – Adding Estate/Probate Records ................................................................................ 113
Chapter 5 – Adding an Obituary .................................................................................................... 139
Chapter 6 – Adding a Death Certificate ......................................................................................... 159
Chapter 7 – Adding Email Correspondence .................................................................................. 183
Chapter 8 – The Smoking Gun ....................................................................................................... 205
Chapter 9 – Adding an Entry from an Online Database .............................................................. 217
Chapter 10 – What Now? .............................................................................................................. 239
Appendix ............................................................................................................................................ 259
# Contents

Preface ........................................................................................................................................................... 11

The Genealogy Diary ..................................................................................................................................... 17

What you’ll learn from this book ................................................................................................................... 21

The Comparison Table ................................................................................................................................. 22

Chapter 1 – Your First Few Legacy Goodies ............................................................................................... 27

Chapter 2 – Adding an Online Document ................................................................................................. 35

Step 1 – Create the To Do item and perform the research. ................................................................... 36

Step 2 – Set up the source clipboard ....................................................................................................... 41

Step 3 – Analyze and add the new data, sourcing as you go ................................................................. 49

Step 4 – Add the digital image to the event. ............................................................................................ 57

Step 5 – Close/Complete the To Do item .............................................................................................. 61

Step 6 – Plan for future research .......................................................................................................... 62

Step 7 – File the paper document, if applicable ..................................................................................... 65

Chapter 3 – Adding a Census Record ......................................................................................................... 67

Step 1 – Create the To Do item and perform the research .................................................................... 68

Step 2 – Set up the source clipboard .................................................................................................... 72

Step 3 – Analyze and add the new data, including the census event, share the event with the other individuals, and source as you go ......................................................................................... 80

Step 4 – Close/complete the To Do item .............................................................................................. 100

Step 5 – Plan for future research .......................................................................................................... 100

Step 6 – File the paper document, if applicable. .................................................................................. 101

1870, 1875, 1880, 1892 censuses (and some killer Legacy tips too!) ....................................................... 102

Chapter 4 – Adding Estate/Probate Records ............................................................................................ 113

Step 1 – Create the To Do item and perform the research. ................................................................. 114

Step 2 – Set up the source clipboard .................................................................................................... 121

Step 3 – Analyze and add the new data, sourcing as you go ................................................................ 128

Step 4 – Close/complete the To Do item .............................................................................................. 136

Step 5 – Plan for future research .......................................................................................................... 137
Step 6 – File the paper document, if applicable ................................................................. 137

Chapter 5 – Adding an Obituary .............................................................................................. 139
Step 1 – Create the To Do item and perform the research .................................................. 139
Step 2 – Set up the source clipboard .................................................................................... 141
Step 3 – Analyze and add the new data, creating the custom “obituary” event, and sourcing as you go .................................................................................................................. 149
Step 4 – Close/complete the To Do item .............................................................................. 156
Step 5 – Plan for future research ......................................................................................... 156
Step 6 – File the paper document, if applicable .................................................................. 157

Chapter 6 – Adding a Death Certificate .......................................................................................... 159
Step 1 – Create the To Do item and perform the research .................................................. 159
Step 2 – Set up the source clipboard .................................................................................... 163
Step 3 – Analyze and add the new data, sourcing as you go .............................................. 169
Step 4 – Add the digital image to the death event ............................................................... 175
Step 5 – Close/complete the To Do item .............................................................................. 180
Step 6 – Plan for future research ......................................................................................... 182
Step 7 – File the paper document, if applicable .................................................................. 182

Chapter 7 – Adding Email Correspondence ................................................................................. 183
Step 1 – Create the To Do item and perform the research .................................................. 183
Step 2 – Set up the source clipboard .................................................................................... 187
Step 3 – Analyze and add the new data, sourcing as you go .............................................. 195
Step 4 – Close/complete the To Do item .............................................................................. 202
Step 5 – Plan for future research ......................................................................................... 204
Step 6 – File the paper document, if applicable .................................................................. 204

Chapter 8 – The Smoking Gun ................................................................................................. 205

Chapter 9 – Adding an Entry from an Online Database ............................................................. 217
Step 1 – Create the To Do item and perform the research .................................................. 218
Step 2 – Set up the source clipboard .................................................................................... 221
Step 3 – Analyze and add the new data, and source as you go ........................................... 227
Step 4 – Close/complete to To Do item .............................................................................. 228
Step 5 – Plan for future research ......................................................................................... 229
Step 6 – File the paper document, if applicable .................................................................. 229
Find A Grave Tool.................................................................................................................................. 232
Chapter 10 – What Now?.......................................................................................................................... 239
Media Files ............................................................................................................................................ 239
#Hashtags#............................................................................................................................................ 245
Publish your findings............................................................................................................................. 255
Future Research .................................................................................................................................... 260
Appendix ................................................................................................................................................... 269
Download and restore the backup ....................................................................................................... 269
How to set the preferred startup family............................................................................................... 270
How to set the bookmarks..................................................................................................................... 271
Never had a document struck me as much as this one had.

After months of searching, careful analysis, and following up on promising leads, the obituary stared at me from my 28” wide-screen, high-definition computer monitor. It began as the moment I have dreamed of for so long – I was finally going to solve the mystery! It concluded with the feeling of a virtual dagger piercing my soul – as if a fully-inflated balloon had expanded beyond its capacity and burst – as if I had been inches from the top of Mt. Everest and fell – all the way down. Only now after several months of genealogical grieving am I able to write about it.

Published in the July 26, 1926 edition of *The New York Times*, Elizabeth Williams’ obituary looked like any other obituary. But to me, it forever altered the course I would take in solving the case of the parents of my great-great-great-grandfather – John Williams.

Nearly everything lined up, so well, and for so long. So well that in my early years of genealogy research I may have considered accepting that I had found the right person. But the fifth line in the obituary put a stop to everything:

**the late John O. Williams.**

It was just 1926. John wasn’t supposed to be “late” yet. Without that phrase – “the late” – I nearly concluded that I had finally identified John’s parents to be *this* John and Eleanor Williams.

Yet, in spite of the devastating find, I averted the greater genealogical tragedy – that of misidentifying *this* John and Eleanor Williams to be *my* John’s parents.
In the beginning…

…wait…

…that sounded a little too much like how a different book began. Let’s try this again.

When I began researching John Williams I was a young, enthusiastic college student. I had yet to grow any gray hair. John’s parents had eluded our family’s best researchers. This was our biggest brick wall. Yet I had just enrolled in the first courses of my four-year degree in Genealogy and Family History. I was going to be the one to crack the case. It started off well.

I quickly learned that we should begin researching an ancestor by looking at the records created at the end of their life, and then work backwards. So I found his death certificate. He died January 11, 1935 in Maywood Township, Benton County, Minnesota. Piece of cake. It verified his name, his wife’s name, told me when and where he was born (September 29, 1854 in Brooklyn, New York) and exactly how long he lived (80 years, 3 months, 12 days). It even gave the names and birth places of his parents: John Williams Sr. and Margareta, both born in England. Eureka!
The next find was another easy one. His obituary was printed in the January 16, 1935 edition of the *Foley Independent*. It verified his name, his death date and place, told who his six children were, and gave the exact number of grandchildren and even his great-grandchildren. I learned that his wife died several years ago, and got a list of the relatives from out of town. Only one thing differed from his death certificate. Here his birth was listed as September 26, 1854 (3 days earlier) and in New York City (instead of Brooklyn). I figured there must have been two different people filling out the information so did not get hung up on these discrepancies. I was off to a great start. This was going to be easy!

Next I learned about and turned to the census records. I found him in the 1930, 1920, 1910, 1900, 1890 (yep, you read that correctly), and the 1880 censuses. And I heard that some people thought that genealogy was difficult. Sheesh.

It kept getting better. I found John in the 1905, 1895, 1885, and 1875 state census records. He was everywhere!

The 1890 census was the first record to really test my inexperience. As you may know, most of the 1890 U.S. census was destroyed/damaged by fire back in 1921. While less than 1% of the population schedules survived, a good number of the Veterans’ Schedules (officially called the Special Schedules of the Eleventh Census (1890) Enumerating Union Veterans and Widows of Union Veterans of the Civil War) also survived.

Take a look.

Williams John alias
Riley Edward!!
I figured this to be the right John Williams since he was living in the right place, and his future son-in-law’s father was listed just beneath him. But “alias Edward Riley” – who was that?

The more I learned about John Williams, the cloudier his research became. In addition to the now six possible birth dates and three possible birth places, I now had another name for him – Edward Riley! Here’s what it looked like:

<table>
<thead>
<tr>
<th>Names</th>
</tr>
</thead>
<tbody>
<tr>
<td>John Williams</td>
</tr>
<tr>
<td>John J. Williams</td>
</tr>
<tr>
<td>John Williams Jr.</td>
</tr>
<tr>
<td>Jack Williams</td>
</tr>
<tr>
<td>Edward Riley</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Birth Dates</th>
</tr>
</thead>
<tbody>
<tr>
<td>abt 1845</td>
</tr>
<tr>
<td>September 29, 1851</td>
</tr>
<tr>
<td>abt 1852</td>
</tr>
<tr>
<td>abt 1853</td>
</tr>
<tr>
<td>September 26, 1854</td>
</tr>
<tr>
<td>September 29, 1854</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Birth Places</th>
</tr>
</thead>
<tbody>
<tr>
<td>Brooklyn, New York</td>
</tr>
<tr>
<td>New York City, New York</td>
</tr>
<tr>
<td>Minnesota</td>
</tr>
</tbody>
</table>

Combine this with 1) the fact that I had two common names – both John and Williams, 2) that his father was also a John Williams, 3) he was born in New York City, and 4) the oral tradition that had been passed down stated John “was orphaned at age 10, and was shifted around until he was 16” – and I discovered my first gray hair and a held up the white flag. It was too much for me. I moved on to a different line to research.

While our lives moved on and we created some descendants of our own, John Williams continued to rest in history as he had since his passing in 1935. I graduated with my degree in Genealogy and Family History, managed the research department of a Salt Lake City-based genealogy company, toured the country teaching others how to find their ancestors, and founded the Legacy Family Tree webinar series. Through it all, I’ve gained experience, grown in knowledge, and have even played a bit with genealogy serendipity.
Nearly fifteen years later, and having just concluded writing *Kindred Voices: Listening for our Ancestors*, I was lying in bed one night pondering about which ancestor I should seek next. I’ve had many experiences where it seemed that my ancestors wanted to be found just as much as I wanted to find them. John Williams’ name kept coming to my mind. Remembering my struggles with him, but recognizing that I’ve grown up genealogically since then, I thought,

“Let’s give John another chance.”

Then I thought,

“Or is it Jack?”

“Or is it Edward?”

I decided to pick it up again.
The Genealogy Diary

I can barely remember what I ate for breakfast let alone who and what I researched fifteen years ago. Yet, with my John Williams research, I was able to pick up right where I left off. In fact, I am able to do this with nearly any of my ancestors’ research – because of a technique I use when researching.

When I left off, John’s Research Report was 43 pages, single-spaced, 12-point font which included:

- My goal statement,
- The known information at the start of the research,
- A detailed thought-by-thought process of what I found and what I did not find,
- An active To Do List of where to research next and why.

My original goal was:

“To learn about John and Margaret Williams family and ancestry.”

That was pretty vague, although I am proud of myself for having written down anything. Next in the report, I included a paragraph of what I knew about John and his ancestry.
The next 40 or so pages acted as my genealogy diary. I recorded what I searched, why I searched it, what I hoped to learn from the search, what I found or did not find, and my thoughts and conclusions. As I wrote, new ideas came to me about where to look next. I immediately added them to the To Do List section at the bottom of the document.

Reviewing these To Do items today I wish I would have written a little more context around each item, such as why the task was significant and what I expected to learn from each one. But after reviewing the complete text, most of them made sense and I did not have to re-think these again.

Regardless of whether the techniques or analysis of the research were sound, the Research Report (although I like the sound of “Genealogy Diary” better) provides these benefits:

- Helps us more easily pick up where we left off.
- When we get stuck, we can let someone else read what we have done. Maybe they will notice something that we overlooked. They might notice an error in my analysis.
- Can serve as the “proof summary” – the detailed explanation of how we know what we know about a relationship.
- If we get to the point where we could benefit from the expertise of a professional, they will want to know about our previous research, and this report provides that.

Do I write a Research Report for every one of my ancestors? No? Should I? Maybe. At the very least, each of our end-of-line ancestors (the brick walls) deserves such attention. They will often be the most difficult problems to solve, and as a natural consequence, you will be learning more about them than most others. We will need to record information about the
history of where they lived, the laws of the area, the religion, the geography, and so much more – all of which are vital to helping us solve the case.

Where should the Research Report be stored? The short answer is somewhere. Anywhere! But it should be stored so even after a fifteen year absence, you, or the family researcher that follows you, can easily find it. I started John’s report in Microsoft Word and stored the document where I store all of my scanned photographs and other genealogy digital images in my c:\Genealogy Photos Pictures directory. Doing it in Word has its advantages – it is simple. It is easy to add tables and even screenshots. But I have to remember where I saved the document. And if I ever upgrade to a new computer, I need to make sure to migrate it properly. Using a cloud-based word processor like Google Docs or Evernote would solve that problem, but I would still need to ensure that it will be preserved and passed on if necessary.

Since I use Legacy every day, and Legacy already has John Williams’ information, sources, and pictures, using its Research Notes area would be ideal. However, these Note areas are not as complex as a full word processor (lacks ability to have tables, scanned images, and screenshots).

So here’s what I do. I keep the active report in my word processor, and every once in a while I do a Control-A, Control-C, another Control-A, and a Control-V. Got it? If not, here’s what I mean.

1. In the word processor, select everything in the document by pressing Control-A.
2. Then copy everything by pressing Control-C.
3. Then in Legacy, open the Research Notes for the person and select everything by pressing Control-A.
4. Then paste the text by pressing Control-V, thus replacing the existing contents of the Research Notes.
This will replace any existing research notes for the person, yet will keep the report up-to-date in Legacy. Now the report is in at least two different places and the likelihood of me or someone else locating it after fifteen years is much higher. At the very least, email yourself (or someone else) a copy of the report every once in a while. These are the same principles and practices you would take with backing up your other genealogy data. Why not do the same with your analysis of it?

Before continuing on, add a check in the checkmark box below signifying that you agree to keep a research report for at least your end-of-line ancestral research.

I will keep a genealogy diary (or at least I will consider it) for each of my genealogy research problems.

Why all this? I’ve found it to be indispensable in helping to solve my difficult research problems. I know it will help you too. Another tool that is just as important is the Timeline and the Comparison Table which we will discuss throughout this book. In fact, this book is like an expanded version of my diary for John Williams PLUS it is full of practical genealogy and Legacy-specific tips and tricks.
What you’ll learn from this book
I intend for this book to serve as a guide that you can apply to your own research and use of Legacy Family Tree. Not only will you learn about different types of records, how to analyze them, but you will also learn how to properly add them to your Legacy software. Along the way you will also learn tips, tricks, and best practices about:

- Shared Events
- Sources, SourceWriter, and the Source Clipboard
- To Do List
- Chronology View, Chronology Comparison Report
- Digital pictures and other media
- Why and how to add unlinked individuals
- Family Mapping
- Quick Access Toolbar
- Brand new Find A Grave tool!
- Media Relinker
- The hidden FamilySearch Export button
- Lots of shortcuts and other tips

I’ve even provided you with a link to see the actual Legacy family file if you want to study it closer. It’s in the Appendix, but don’t look now or you’ll spoil the surprise.

The rest of the book illustrates the actual research process I undertook to try to locate John’s parents. It is written in the “Watch Geoff Live” style, meaning, it is what I was thinking and doing as the research happened. And while researching with a solid plan is often ideal, I try to be flexible enough to follow new leads when they present themselves and see where they take me. So while I am certain there are many paths to discovering what I did, what you will read is how I actually performed the research – right or wrong – and will present you with new techniques and methodologies that can you apply to your research and to your use of your Legacy Family Tree software. By the end of the book, you’ll have dozens of new tools to use and you’ll have a good model to refer to when recording your facts and citations.

After my 15-year-absense, before I resumed John’s research, I did the following:

- Reviewed the research report to catch up on where I left off.
- Took another look at every document I previously found, both for a review, and because I might notice something different this time around. And I did in a big way!
• Remembered that I have developed new research skills and now have lots of experience under my belt. I’m a much better researcher today!
• Remembered that access to records is waaaay better today.

Then I tried to narrow my focus. I had many angles I could take. I could…

1. Follow up with the family’s oral tradition of “was orphaned at age 10, and was shifted around until he was 16” and look for adoption, guardianship, and death records of his parents.
2. Begin looking for John Williams in New York. There are lots…and lots…and lots of them.
3. Search for Edward Riley in New York. There probably aren’t as many of that name.
4. Keep going with the To Do tasks I previously recorded.

I decided to start by taking another look at the records I previously located. But this time, I tried to keep in mind that John Williams and Edward Riley could be the same person.

The Comparison Table
The key to my success in differentiating my John Williams from others with the same name is the comparison table. This table makes it easy to visualize if the person who I think is the right person could be the right person. And the key to using the table is to remember that a person usually did not reside in two different places at the same time.

The comparison table can be created using a number of tools. Here I will describe three of them and let you choose which works best for your way of thinking. Keep in mind that this is just another tool for your genealogy toolbox – you will not need it for every ancestor you seek, but it is there when you need it. I use it when I am trying to differentiate two individuals of the same name and since this contributes to the storyline of discovering (or disproving) John’s parents, it deserves the attention I will give it here.

Whether you use 1) the word processor, the 2) spreadsheet, or 3) Legacy’s Chronology Comparison Report, the layout of each tool is similar and the purpose of each is the same. Two timelines are created and displayed side-by-side. The filled-in timeline for the known ancestor is on the left and a blank corresponding timeline for the ancestor we are researching is on the right. As we research the possible ancestor and learn where they lived on a specific date, that information gets added to the timeline on the right. As long as the date and place of the events in the timeline on the right do not conflict with the dates and places on the left – we can continue to research the possible ancestor. But the moment that the events begin...
to conflict with each other is the moment when we might discover that the two persons cannot be the same.

For example, according to the timeline of my known John Williams, he was living in Maywood, Benton County, Minnesota at the time of the 1900 census. If my research of the possible John Williams finds that he was living anywhere else at the same time, then we have a conflict. Although it’s possible that the two are the same person, it’s not usually probable. This will become clear through this story.

Below are examples of these three tools at the beginning of my research.

**Word Processor (2 tables side-by-side)**

The left shows what is known about my John Williams. The right is the blank table to record the results of the possible John Williams.

<table>
<thead>
<tr>
<th><em>My</em> John Williams (or Edward Riley)</th>
<th>Possible John Williams</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Year</strong></td>
<td><strong>Event</strong></td>
</tr>
<tr>
<td>1845-1854</td>
<td>Birth</td>
</tr>
<tr>
<td>1860 Jun 1</td>
<td>Census</td>
</tr>
<tr>
<td>1862-1865</td>
<td>Military</td>
</tr>
<tr>
<td>1870 Apr</td>
<td>Migration</td>
</tr>
<tr>
<td>1870 Jun 1</td>
<td>Census</td>
</tr>
<tr>
<td>1875 May 1</td>
<td>Census</td>
</tr>
<tr>
<td>1876 May 10</td>
<td>Birth of child</td>
</tr>
<tr>
<td>1877 Dec 29</td>
<td>Birth of child</td>
</tr>
<tr>
<td>1880 Jan</td>
<td>Birth of child</td>
</tr>
<tr>
<td>1880 Jun 1</td>
<td>Census</td>
</tr>
<tr>
<td>1881 Dec 18</td>
<td>Birth of child</td>
</tr>
<tr>
<td>1884 Jul</td>
<td>Birth of child</td>
</tr>
<tr>
<td>1885 Jun 2</td>
<td>Census</td>
</tr>
<tr>
<td>1888 Dec 17</td>
<td>Birth of child</td>
</tr>
<tr>
<td>1890 Jun</td>
<td>Census</td>
</tr>
<tr>
<td>1891 Jan 23</td>
<td>Birth of child</td>
</tr>
<tr>
<td>1895 Jun 17</td>
<td>Census</td>
</tr>
<tr>
<td>1896 Jul 8</td>
<td>Birth of child</td>
</tr>
<tr>
<td>1900 Jun 13 (before)</td>
<td>Birth of child</td>
</tr>
<tr>
<td>1900 Jun 13</td>
<td>Census</td>
</tr>
<tr>
<td>1905 Jun 21</td>
<td>Census</td>
</tr>
<tr>
<td>1907 Mar 2</td>
<td>Death of child</td>
</tr>
<tr>
<td>1910 May 3</td>
<td>Census</td>
</tr>
<tr>
<td>1920 Jan 19</td>
<td>Census</td>
</tr>
<tr>
<td>1930 Apr 27</td>
<td>Census</td>
</tr>
<tr>
<td>1955 Jan 11</td>
<td>Died</td>
</tr>
</tbody>
</table>
Spreadsheet

Same story as above, but this time in spreadsheet form.

<table>
<thead>
<tr>
<th></th>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
<th>E</th>
<th>F</th>
<th>G</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Year</td>
<td>Event</td>
<td>Place</td>
<td>Year</td>
<td>Event</td>
<td>Place</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>1845-1854</td>
<td>Birth</td>
<td>Brooklyn, NY or Minnesota</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>1860 Jun 1</td>
<td>Census</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>1862-1865</td>
<td>Military</td>
<td>New York</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>1870 Apr</td>
<td>Migration</td>
<td>NY to Minnesota</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>1870 Jun 1</td>
<td>Census</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>1875 May 1</td>
<td>Census</td>
<td>Brooklyn, Hennepin, MN</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>1876 May 10</td>
<td>Birth of child</td>
<td>Osseo, Hennepin, MN (Margaret)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>9</td>
<td>1877 Dec 29</td>
<td>Birth of child</td>
<td>Osseo, Hennepin, MN (Lillian)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>10</td>
<td>1880 Jan</td>
<td>Birth of child</td>
<td>MN (Stella)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>11</td>
<td>1880 Jun 1</td>
<td>Census</td>
<td>Brooklyn, Hennepin, MN</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>12</td>
<td>1881 Dec 18</td>
<td>Birth of child</td>
<td>Osseo, Hennepin, MN (John L.)</td>
<td></td>
<td></td>
<td></td>
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</tr>
<tr>
<td>13</td>
<td>1884 Jul</td>
<td>Birth of child</td>
<td>MN (James)</td>
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<tr>
<td>14</td>
<td>1885 Jun 2</td>
<td>Census</td>
<td>Maywood, Benton, MN</td>
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<tr>
<td>15</td>
<td>1888 Dec 17</td>
<td>Birth of child</td>
<td>Oak Park, Benton, MN (Esther)</td>
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<tr>
<td>16</td>
<td>1890 Jun</td>
<td>Census</td>
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<td>17</td>
<td>1891 Jan 23</td>
<td>Birth of child</td>
<td>Oak Park, Benton, MN (Richard)</td>
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<td>18</td>
<td>1895 Jun 17</td>
<td>Census</td>
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<tr>
<td>19</td>
<td>1896 Jul 8</td>
<td>Birth of child</td>
<td>Oak Park, Benton, MN (Della Mae)</td>
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<tr>
<td>20</td>
<td>1900 Jun 13 (before)</td>
<td>Birth of child</td>
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<td></td>
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<tr>
<td>21</td>
<td>1900 Jun 13</td>
<td>Census</td>
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<td>22</td>
<td>1905 Jun 21</td>
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<tr>
<td>23</td>
<td>1907 Mar 2</td>
<td>Death of child</td>
<td>Akeley, Hubbard, MN (Margaret)</td>
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<td>24</td>
<td>1910 May 3</td>
<td>Census</td>
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<tr>
<td>25</td>
<td>1930 Jan 19</td>
<td>Census</td>
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<td>26</td>
<td>1950 Apr 27</td>
<td>Census</td>
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<tr>
<td>27</td>
<td>1955 Jan 11</td>
<td>Died</td>
<td>Oak Park, Benton, MN</td>
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</table>
**Chronology Comparison Report (Legacy 9 or later)**

And this is the same information, but produced using the Chronology Comparison Report in Legacy 9 (or later). In Legacy, go to Reports > Other Reports > Chronology Comparison Report. Using this report eliminates the duplication of re-typing and updating the information into a word processor or a spreadsheet. Here is page 1 of 3:

![Chronology Comparison Report](image)

Legacy also analyzes the information. Below is the zoomed-in legend:

- **Data is the same on both sides**
- **Data not exact or only available on one side**
- **Data is not compatible**

Which of these three tools you use is up to you. I like the simplicity of the spreadsheet, yet like the additional analysis of Legacy’s report.
In its simplest form, my goal is to find John Williams Jr.’s parents and potential siblings, teach you how to better utilize Legacy Family Tree, and while doing all this, I promise to provide you with a good story too.

And so with that … off we go!