

How To Use New FamilySearch Correctly

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This manual and its updates can be downloaded for free at www.usingfamilysearch.com.

A video tutorial based on this manual is being produced and will be available for free download at www.usingfamilysearch.com.

**PLEASE TELL YOUR FRIENDS AND RELATIVES ABOUT THIS MANUAL.
The better-trained New FamilySearch patrons become, the fewer who will mess up our shared family tree!**

About The Author

George Scott began working on his family history in 1969, a few months after his conversion. In 1971, he presented a proposal for a stake extraction program to the Genealogical Society (now the Family History Department); the extraction program has provided half the names used for temple ordinances during the past 35 years. In 1981, he served on the Ancestral File design advisory committee. His involvement with New FamilySearch began in the year 2000; he beta-tested the system in February 2007. Since then, he has spent over 2,000 hours beta-testing, working on his own New FamilySearch family tree, teaching New FamilySearch classes at the Lindon Utah Shared-Stake Family History Center and in his ward, and helping scores of other New FamilySearch users.

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FOREWORD

Based on their experience in family history, Latter-day Saints generally belong to one of the following three groups:

1) About 2% - 3% of adult Mormons have done extensive research into their family history. There is a great amount of work required to clean up our family trees in New FamilySearch. The bulk of this work will fall upon this 2% - 3%, as they are the ones with the extensive knowledge of their family trees.

2) Perhaps the majority of Mormons have an L.D.S. relative in Group 1, who has done most of the family history research for your family, to date.

The members of Group 2 have greatly benefitted from the hard work of their Group 1 relatives. Many members in Group 2 would like to make a meaningful contribution to the family history effort, but just don't know how to do so.

Some of you may want to do Descendancy Research. (See chapter 9 on page 54.)

But for the vast majority of Church members, the best way to contribute to the family history effort would be to become Indexers in the FamilySearch Indexing program. Indexing is the simplest of all family history research activities. The Indexing program will revolutionize the way we do family history research, making it much simpler, much faster, and much more accurate. (See pages 44 - 47.) The Church needs hundreds of thousands—indeed millions—of Indexers to index the billions of records of genealogical value. **Every able-bodied member of the Church aged 13 and above who has access to the internet should volunteer as an Indexer.** To learn more about the program, please go to www.FamilySearchIndexing.org or talk to a Family History Consultant in your ward.

3) Some members of the Church are relatively recent converts with no L.D.S. relatives. You won't have to clean up an existing family tree in New FamilySearch. Instead, you need to build your family tree from scratch. In this manual, in Chapter 4, you will do Steps 1 - 4, 7, 9 and 10. You will probably have little to do in Steps 5 - 6, 8, and 11 - 16.

You will have the joy of discovering your ancestors and doing the temple work for them. There is a good chance that by the time you get back to the early 1800's, your lineages may run into the family trees of other Church members on New FamilySearch, allowing you to piggyback on their research.

To the members of each group, I wish you God Speed! I promise that the angels of heaven will attend you as you sacrifice your time in humble service toward the redeeming of the dead.

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INTRODUCTION: WHAT IS NEW FAMILYSEARCH?

New FamilySearch is a great advance in the work of redeeming the dead. It is an online shared family tree which serves as the Church's¹ method for clearing names for temple ordinances. The website address² is <https://new.familysearch.org> .

New FamilySearch's database includes the temple records (the IGI, or International Genealogical Index), the old Temple Index Bureau, Ancestral File, Pedigree Resource File, Four Generations Sheets, and the LDS membership records. It currently contains about one billion records.

New FamilySearch was created at the behest of President Gordon B. Hinckley,³ who was concerned about the excessive duplication of temple ordinances.

If New FamilySearch is used correctly, it will accomplish President Hinckley's goal of avoiding duplication of temple ordinances. Plus, it will make genealogical research:

much easier,
much faster, and
much more accurate,

especially after it is linked with FamilySearch Indexing.

New FamilySearch is built with an open architecture, which will allow it to expand in functionality by adding more and more features for years into the future. As a result, New FamilySearch is here to stay. We will be using New FamilySearch for the remainder of our mortal lives. So, it's worth investing the time and effort into learning it well and using it well.

The Brethren⁴ have said that computers, the internet, and other technological advances have been

¹“Church” in this book refers to The Church of Jesus Christ of Latter-day Saints.

²The “s” after “http” indicates the entire website is on the secure (encrypted) portion of the internet. This is to prevent hackers from entering the website. On the website you will notice a small padlock in the lower right-hand corner; this indicates you are on the secure portion of the internet. Internet merchants generally place one page of their website on the encrypted portion of the internet in order to safely process credit card transactions.

³President Hinckley said: “One of the most troublesome aspects of our temple activity is that as we get more and more temples scattered across the earth there is duplication of effort in proxy work. People in various nations simultaneously work on the same family lines and come up with the same names. They do not know that those in other areas are doing the same thing. We, therefore, have been engaged for some time in a very difficult undertaking. To avoid such duplication, the solution lies in complex computer technology”. (“Opening Remarks, *Ensign*, November 2005, pages 5-6.)

⁴Elder Russell M. Nelson declared: “We are blessed to be living in such an exciting gospel dispensation. God is inspiring the minds of great people to create inventions that further

given in our time to carry out and hasten the work of the Lord—we are indeed seeing that!

Let us be valiant! Remember, we are called to stand forth as saviors on Mt. Zion.⁵

Computer System Requirements

To utilize New FamilySearch's full features, you must have Adobe Reader 8.0 (or higher) and Flash Player 9.0.115 (or higher). You probably already have them, particularly Adobe Reader.

If you don't, go to www.adobe.com.

the work of the Lord in ways this world has never known. I recall the statement of Joseph Fielding Smith:

“I maintain that had there been no restoration of the gospel, and no organization of the Church of Jesus Christ of Latter-day Saints, there would have been no radio; there would have been no airplane, and there would not have been the wonderful discoveries in medicine, chemistry, electricity, and the many other things wherein the world has been benefitted....The inspiration of the Lord has gone out and takes hold of the minds of men, though they know it not, and they are directed by the Lord. In this manner He brings them into His service that His purposes and His righteousness, in due time, may be supreme on the earth”. (*Ensign*, April 1988, page 73.)

Elder Henry B. Eyring pointed out: “The Lord has poured out knowledge about how to make [genealogical] information available worldwide through technology that a few years ago would have seemed a miracle.

“With those opportunities there comes greater obligation to keep our trust with the Lord. Where much is given, much is required.” (*Ensign*, May 2005, pages 79-80.)

⁵Obadiah 1:21.

CHAPTER 1: A HISTORIC OVERVIEW OF YOUR ANCESTRY

“The Most Recent Common Ancestor of Mankind” or “One Big Happy Family”

The Bible identifies Adam and Eve as the parents of all mankind.

For the past century, physical anthropologists and paleontologists have argued that our most recent common ancestor (MRCA) must have lived 200,000 years ago, probably in northeast Africa.

However, recent statistical analyses by Joseph Chang, a professor of statistics at Yale University, and his colleagues Rohde and Olson, provide a much more recent date for mankind’s MRCA.⁶

Chang began with European historical statistics involving demographics, migration patterns, wars, diseases, etc. He concluded that of Europe’s population in 1000 A.D., approximately 20% have no descendants alive today. Of the remaining 80% of Europe’s population in 1000 A.D., each and every one is the ancestor of every person alive today with any European blood.

Chang next extrapolated back to the year 1 A.D., utilizing sophisticated statistical modeling. He came to the conclusion that with the exception of some small isolated populations in Siberia and the Pacific Islands, the same basic parameters applied more broadly to all mankind:

Approximately 20% of the world’s population living in 1 A.D. have no descendants alive today, but the remaining 80% of the world’s population alive in 1 A.D. (less those small isolated groups) are each the ancestor of every single person alive today.

Next, Chang estimated that if you go back to about 600 B.C., the same parameters apply to those isolated populations in Siberia and the Pacific Islands. Thus, 20% of the entire world’s population alive in 600 B.C. have no living descendants today, but of the remaining 80%, each is the ancestor to every person alive today.⁷

Implications of the MRCA Study

How does the study of mankind’s MRCA relate to you?

⁶Chang, Joseph T. (1999). "Recent common ancestors of all present-day individuals", *Advances in Applied Probability* (31): 1002–1026.

[Http://www.stat.yale.edu/~jtc5/papers/Ancestors.pdf](http://www.stat.yale.edu/~jtc5/papers/Ancestors.pdf). Also, Rohde DLT, Olson S, Chang JT (2004) "Modelling the recent common ancestry of all living humans", *Nature* 431: 562-566.

⁷Subsequent studies concentrating on those small isolated groups suggest some may have remained in isolation sufficiently long to push the human MRCA back a few additional millennia. The lack of historical documentation makes it impossible to definitively place a date on mankind’s MRCA, although the 6th millennium B.C. is considered the outermost date by the statisticians. However, for about 99% of mankind, our MRCA dates to 1 A.D., with 600 B.C. a *possible* (though not conclusive) date for the MRCA for all mankind.

If you have any European blood, then you are a direct descendant of 80% of the European population circa 1000 A.D. (and you are collaterally related to the other 20%). Your direct ancestors circa 1000 A.D. numbered about 30 million (80% of Europe's 37 million residents in 1000 A.D.⁸).⁹

Similarly, if you have Asian blood, then you are a direct descendant of 80% of the Asian population circa roughly 900 - 1000 A.D. (and collaterally related to the other 20%), with perhaps 148 million ancestors at that time.

If you have African blood, you are a direct descendant of 80% of the African population circa roughly 900 - 1000 A.D. (and collaterally related to the other 20%), with perhaps 25 million ancestors at that time.

Everyone of European blood is a descendant of Lady Godiva, one of the most noble of all the sons and daughters of Adam and Eve. She was the wife of the Earl of Mercia (a principality in the center of England). The Earl had levied unbearable taxes; the people pleaded with Lady Godiva to convince her husband to reduce the tax burden. Flippantly, the Earl answered Lady Godiva that he would reduce the taxes if she would ride naked through town, not thinking she would even consider it. After all, she was the Countess, a lady of great dignity (and probably about 40-50 years of age). But she loved the people so much, she was willing to risk public humiliation for the rest of her life in order to help her subjects. And the people greatly loved her. So, at the appointed day and hour, when Lady Godiva disrobed and began riding her steed through Coventry (the capital), everyone had retired to their homes, closed their doors, and shuttered their windows. Coventry, a busy commercial center, looked like a ghost town. The Earl had to abide by his word--he lowered the taxes. To this day, Lady Godiva is the second-most beloved of all English folk heroes, surpassed only by Robin Hood.

The story of Lady Godiva brings us to a frequently-asked question: Are you descended from royalty? Yes, you are.¹⁰ You may or may not be able to find documents tracing your family line

⁸Population estimates for 1000 A.D. were taken from <http://www.worldhistorysite.com/population.html>.

⁹This should not be surprising. The number of your direct ancestors increases exponentially as you go back in time. You have 2 parents, 4 grandparents, 8 great grandparents, etc. Assuming 30 years between generations, there would be about 32 generations between you and 1000 A.D., so 2 raised to the 32nd power would give you over 4 billion ancestors (4,294,967,296, to be precise) in the year 1000 A.D. However, most of those are duplicate positions in your pedigree chart; you actually had around 30 million ancestors in the year 1000 A.D.

¹⁰www.ancestry.com/learn/library/article.aspx?article=5921. Also, www.theatlantic.com/doc/200205/olson.

back far enough to make the connection to royal families,¹¹ but everyone—black, white, Hispanic, Asian, or Polynesian—is descended from royalty. After all, if you go back to 1000 A.D., you are related to everyone on your continent of origin, and there were kings and queens in Africa, Asia, Oceania, Europe, and the Americas.

You are descended from the ancient Roman emperors, Cleopatra, the ancient Pharaohs of Egypt, and Alexander the Great. (You are also descended from Aristotle, Plato, and many great scientists and mathematicians.)

So, yes, you are of royal descent. Now, that is both good and bad. You have royal blood flowing through your veins, but remember that not all kings were good guys.

It is humbling to contemplate that, assuming at least one of the brothers or sisters of the Savior has descendants alive today, then you are descended from the Holy Family.

Debunking Racial Myths

Racists are unfortunate, ignorant souls. They fail to realize that every white American has African blood flowing through his veins.

After all, the MRCA study shows that, setting aside a few isolated Siberian and Pacific Islander populations, each of us is descended from 80% of the members of **every** ethnic group existing in 1 A.D. (and collaterally related to the other 20% of each ethnic group). Thus, every white American has millions of black African ancestors. And every black American has millions of white ancestors.

Probably about 15% of the ancestors of each white American were black Africans.

Each of us has blood from Nigeria, India, China, Iran, Mozambique, Russia, Tonga, the Native Americans, the Australian aborigines, Sweden, Egypt, etc.

Historical records and archaeological remains demonstrate there were migrations going on continually all throughout history. Jews migrated to Japan 2,000 years ago. Africans traveled to the Americas many centuries before Columbus. Ghengis Khan caused a massive influx of Asian blood into eastern Europe.

So, there is no such thing as a racially-pure people. We are **all** mongrels. We are Heinz 57.

Instead of disparaging other racial and ethnic groups, we should recognize and embrace our common heritage.

In the end, above all, we are united familiarly by the fact that we are all sons and daughters of our Heavenly Father.

¹¹See http://en.wikipedia.org/wiki/Royal_descent.

CHAPTER 2: COLLABORATION IS THE KEY TO SUCCESSFUL FAMILY HISTORY RESEARCH

The MRCA (Most Recent Common Ancestor) study demonstrates how incredibly interrelated we are. It also points out the huge number of ancestors you have—tens of millions!

If you just go back to the year 1500 (when records of genealogical value became more common), you could have tens of thousands of direct ancestors; when you add their siblings, you may have over 100,000 members of your direct ancestral families.

So there's no way for you to research and identify all of your ancestors in your brief mortal lifespan. The only way we can accomplish the task of identifying our dead and performing the saving temple ordinances for them is to work together.

Thus, *collaboration is the key to successful family history research.*

And, fortunately, New FamilySearch is all about collaboration.

Through the internet, New FamilySearch provides us the opportunity to collaborate in ways we never dreamed of before. The Lord promised to hasten the work in His day--and that is precisely what He is doing!

Collaboration—A New And Improved Approach

Collaboration will allow us to work more efficiently and more effectively. In the past, we used “the shot gun approach”—we each tried to research all of our ancestral lineages. But they are so vast that most of the research was sketchy. What generally happened was endless duplication of a few easy-to-find families, while other families of your lineage were overlooked.

We put in a ton of time, but we largely spun our wheels.

Through effective communication and collaboration, we will be able to accomplish more, do it in less time, and do it more accurately.

We need to:

- 1. communicate more among ourselves,**
- 2. each take a small niche of the family tree to research intensively, and then**
- 3. share what we have discovered.**

What we need to do is communicate among ourselves, and each agree to intensively research a small niche of our family tree, and then share our research with each other on New FamilySearch. Effective communication can make that happen!

If you do that, the day will come when the Lord will say to you: “Well done, thou good and faithful servant: thou hast been faithful over a few things, I will make thee ruler over many things: enter thou into the joy of thy lord.” (Matthew 25:21.)

The Keys To Successful Collaboration

What does it take for collaboration to work?

First, it requires the ability to communicate. *In New FamilySearch, that means everyone needs to make their email address available to other New FamilySearch patrons, so we can collaborate.*

Second, *we have to be respectful to each other, even when a distant cousin messes up one of your lineages.* After all, the Lord has forgiven you—you can forgive others.

Please don't be angry at your relatives for genealogical mistakes they have made.

Probably the greatest threat to the success of New FamilySearch is the anger you feel when someone has messed up your family tree. This is a natural feeling, but it is a sentiment of the “natural man.” We have promised to forsake the “natural man” and take upon us Christ’s name.

If you were to become angry and communicate unkind sentiments towards your distant cousins, New FamilySearch would screech to a halt. New FamilySearch can only succeed if we treat all other patrons in the same manner in which we would want to be treated (the Golden Rule).

Please treat your distant cousins with Christ-like love.

Thus, if for no other reason than the desire to accomplish the task the Lord has given you, you must purge your heart of unkind feelings toward those who have made mistakes in your New FamilySearch family tree. They may have erred negligently or simply lacked adequate time or resources to perform the high quality of research you demand of yourself, but certainly they did not commit the mistakes intentionally. If we cannot forgive unintentional errors, where do we stand before the Lord?

Let us become Christ-like in our sentiments toward our distant cousins; let us emulate the Savior. Let’s regard our relatives as *partners* in this great venture rather than as *competitors* for our family tree!

CHAPTER 3: WORKING IN LOGICAL ORDER IN NEW FAMILYSEARCH

You can save yourself an enormous amount of time (and frustration) by working in logical order in New FamilySearch, following the steps below. Chapter 4 explains each step in detail.

Step 1. Register on New FamilySearch.

Step 2. Connect yourself with your family tree.

Step 3. Start the online training program. Also, learn where to find Help.

Step 4. Map out a plan for working with your family tree.

Do Steps 5, 6, 7 and 8 for an individual before moving on to another individual.

Step 5. Combine all the records for the individual.

Step 6. Separate out any records from the individual's Combined Record which don't pertain to him.

Step 7. Clean the individual's Summary screen.

Step 8. Declare yourself the Legacy Contributor of previously-submitted records, where appropriate.

Do Steps 9 and 10 for a nuclear family before moving on to another nuclear family.

Step 9. Search for family members missing in New FamilySearch.

Step 10. Reserve family members for temple ordinances.

Complete Steps 5 - 10 for the portion of your New FamilySearch family tree which you plan to clean up. Then do Steps 11 - 16 as global activities for that same portion of the family tree.

Step 11. Correct erroneous data you submitted in past years.

Step 12. Make the necessary preparations for Synchronizing your PAF file with your New FamilySearch family tree.

Step 13. Synchronize your PAF file with New FamilySearch.

Synchronization allows you to selectively copy data from PAF to New FamilySearch and from New FamilySearch to PAF.

Step 14. Reserve names you added during Synchronization.

Step 15. Make additional adjustments to the Summary screens, as a result of the data you copied from your PAF file to New FamilySearch during Synchronization.

Step 16. Send emails to Contributors whose data is incorrect. Dispute incorrect information if the Contributor lacks an email address.

Sixteen steps! Putting your New FamilySearch family tree in order is a lot of work, but it is a glorious and eternal work!

CHAPTER 4: WORKING STEP-BY-STEP THROUGH NEW FAMILYSEARCH

This chapter is a study guide correlated with the steps listed in Chapter 3, Working In Logical Order In New FamilySearch.¹²

Step 1. Register on New FamilySearch.

Registration: Even if you are registered on the FamilySearch website, you need to separately register on the New FamilySearch website. You need your membership number and your confirmation date to register. Step-by-step instructions are given in Assignment #1 below.

Profile: While you are registering, you will establish your Profile and Preferences, which allow you to decide how other patrons can contact you. You can update your Profile and your Preferences at any time, by clicking on *Update My User Profile* on the New FamilySearch homepage.

Please make your email address available to other New FamilySearch patrons, for collaboration. You can do so when creating or updating your Profile.

Assignments:

1. If you have not registered at New FamilySearch, please do so now:
 - (a) Sign onto <https://new.familysearch.org>.
 - (b) Click on the link which says *Register for the new FamilySearch*.
 - (1) Enter your membership number. (It is located on your temple recommend; alternatively find it on your Individual Ordinance Summary, which you received at tithing settlement.)
 - (2) Enter the date you were confirmed a member of the Church (from your Individual Ordinance Summary).
 - (3) Enter the text from the picture (which is a security measure designed to thwart automated hacking).
 - (4) Click the *Continue* button.
 - (5) New FamilySearch will identify you from the membership records and ask you to confirm your identity by clicking on the *Yes, Continue* button.
 - (c) You will then create a Username for yourself. (The Username can never be changed.)
 - (d) You will next create your Password. (You can later change your Password.)
 - (e) Write down your Username and Password so you won't forget them.
 - (f) You will next create your Profile. Your Profile identifies by what means (email, mail and/or phone) the FamilySearch Support Staff can reach you if you send them an inquiry or feedback. Your Preferences also identify the name and contact information (email, mail and/or phone) by which other New FamilySearch patrons can contact you

¹²If you are a Family History Consultant planning to teach a New FamilySearch class during Sunday School, you could use this as a lesson plan, while your students use it as a study guide. See Appendix A for suggestions on how to present this material in a class setting.

concerning the data you enter into New FamilySearch. Please permit other patrons to contact you by email.

2. After registering with New FamilySearch, you can sign in with your Username (Sign-in Name) and Password. A pop-up screen will appear on top of the homepage. The pop-up screen is a 10-minute overview (video) entitled *Introduction to FamilySearch*. Please view the overview. At the end of the overview, you will see a list of ten overviews (videos) and eight guides (publications); you can return to this menu of overviews and guides at any time by clicking *Learn How To Use FamilySearch* in the left-hand menu of the New FamilySearch homepage.

Additional Resource: Chapter 1 of *A User's Guide To The New FamilySearch*.¹³

It is very important that you reveal your email address so other patrons can communicate with you.

New FamilySearch is all about collaboration. In the past, we had no effective way to collaborate. Collaboration will allow us to build our family trees much faster, and to do so far more accurately. New FamilySearch makes it possible to identify other descendants of our common ancestors and provides a means of communicating with each other via email. But that only works if we make our email address available to other New FamilySearch patrons.

When you first registered, you were given the opportunity to make your email address available for other patrons to see when they click on your name under *Contributor* of data in the individual records. If you did not do so when you registered, you can make your email available to other patrons now by Updating Your Profile (from the New FamilySearch home page).

Email is a safe way to communicate; no one can come to your house and punch you in the nose. ☺ So, please make your email address available to other New FamilySearch patrons. If you have any reservations about doing so, you can always create a separate email address solely for genealogical collaboration. You can create email addresses for free at many websites, including www.gmail.com, www.hotmail.com and www.aol.com.

Providing your email address for collaboration purposes is absolutely essential if you contribute information to New FamilySearch, dispute data, or reserve names for temple ordinances.

¹³*A User's Guide To The New FamilySearch* is a 200+ page guide (publication), which you can access from *Learn How To Use FamilySearch* on the New FamilySearch homepage.

Step 2. Connect yourself with your family tree.

From the New FamilySearch homepage, click on *Me And My Ancestors* to see your pedigree chart. You will see your name and your spouse (if you are married) in what we call *Main Position* near the middle of the pedigree chart, with your children to the left, and your ancestors and your spouse's ancestors to the right.

Sometimes you need to add your parents or grandparents in order to see your family tree. You can do so by clicking *Add or find husband* and *Add or find wife* where their names should be. This will bring up the *Search screen* so you can search for an existing record of the missing family member. You can search for deceased persons, but not for Living Persons. (Due to privacy laws, New FamilySearch does not allow you to see Living Persons except members of your immediate family.¹⁴) So, search for deceased parents or grandparents, if needed, but *Add* living parents or grandparents.¹⁵ After you have ensured your parents and grandparents are on your pedigree chart, several more generations will generally pop on.

You can navigate around the pedigree chart by clicking on the left and right arrows.

You can move an ancestor into “main position” by clicking the arrow in front of his name.

When you click on a person in the pedigree chart, his record appears below the pedigree chart. An individual has the following 8 screens (pages of information):

Summary

Details (displays the individual's name and birth and death data)

LDS Ordinances

Time Line

Map

Parents And Siblings (displays family members and marriage data)

Spouses And Children (displays family members and marriage data)

Possible Duplicates.

An asterisk (*) in the pedigree chart indicates there is more than one set of parents.

An icon of a man and woman after a name in the pedigree chart means he had multiple spouses.

You can click on the asterisk or the icon to see the additional individuals.

A *View Family Group Sheet* link will be added to the Spouses & Children screen and the Parents & Siblings screen in December 2009. The family group sheet displays the data in the individuals' Summary screens (not the multitudinous data in their Details screens).

¹⁴You should be able to see all data for your minor children, but you can generally only see the name and gender of adult Living members of your immediate family.

¹⁵Use the *Add New Individual* tab in the *Search* screen. (Notice that at the top of the *Search* screen, there are tabs for *Add New Individual* and *Find Existing Individual*.)

Family Tree

In addition to the *Family Pedigree with Details* with which you are familiar, in December a second form of the pedigree chart, entitled *Family Tree*, will be added. You can switch between the two pedigree charts by clicking *Change View* in the upper left-hand corner of the screen.

When you are in *Family Tree* you can also click *Change View* to see an *Individual List* of the people currently in the screen's view of your pedigree. You can sort the list by surname, given name, gender, birth date, birthplace, or PID (Person Identifier).

In *Family Tree* you can zoom in or out using the zoom bar in the upper left-hand corner. You can also move the pedigree up or down or left or right using the pointers in the diamond. To return the pedigree to its original position, click the box in the middle of the diamond.

In *Family Tree* you can see more generations in your pedigree chart by clicking the right arrow. You can grab the pedigree and move in up or down, left or right. When you hover your cursor over a person, the route back to you will be highlighted.

You can change the ancestral pedigree to a descendency pedigree by clicking the Descendants icon at the top of the screen. You can switch back by clicking the Ancestors icon.

When you click on a person in the pedigree, that person's folder appears in the right column of the screen. In the folder, if you click *View Details*, a pop-up screen will appear showing the person's record. You can click *Family Group Record* to view or print the person's Family Group Record, but you can no longer edit data in the Family Group Record view.

You can *Add Parents* or a *Spouse* or a *Child* for the person by clicking the links so named. Doing so will open the *Search screen* so you can search for a record for the family member; you can also use that pop-up screen to *Add* the family member if the search does not produce a record for that individual.

The person's folder has a Summary icon (a piece of paper) and a family icon. You can toggle those two icons to see either the person's Summary or a list of his family members. If you click on the name of a family member, a pop-up screen will appear with that individual's record.

Assignment:

1. From the New FamilySearch homepage:
 - (a) Click on *Help Me Get Started With Family History* in the left-hand menu. Watch this 5-minute video.
 - (b) Click on *Learn How To Use FamilySearch* in the left-hand menu. Watch the following Overview (video): *Navigating And Finding Information*.
 - (c) Click on the *Help Center*. Click on the *Training & Resources* tab at the top of the Help Center. Go into the New FamilySearch e-Learning Course, and review the first segment, *Viewing information about your family*. (Training materials don't reflect *Family Tree*.)

Additional Resource: Chapter 2 of *A User's Guide To The New FamilySearch*.

Step 3. Start the online training program. Also, learn where to find Help.

You have many training opportunities for New FamilySearch.

New FamilySearch is a great computer program, but it's rather complicated, particularly if you aren't accustomed to working on a computer. On the New FamilySearch homepage, you can click on *Learn How To Use FamilySearch* to access ten Overviews (videos) and eight Guides (publications). You should study the Overviews very carefully. If you aren't computer savvy, it's best to review them two or three times.

New FamilySearch's Help Center also has an e-Learning Course which is very helpful.

The Assignments at the end of each Step present the Overviews and Guides and the segments of the e-Learning Course in logical order of learning.

You might also check with your ward Family History Consultant, who may offer a class during Sunday School.

Also, many Family History Centers offer classes on New FamilySearch.

A comprehensive list of training materials available at New FamilySearch and some other websites is available in Document 106925. (Go to the Help Center and enter 106925 in the search field.)

Help abounds on New FamilySearch!

First, there are great helps within the New FamilySearch website. Screens have a link entitled either *Help* or *Help with this page*.

Also, the Help Center (which you can access from the New FamilySearch homepage and also from the bottom of most major screens) is a wealthy source of help. You can search for answers using the Help Center's *Search* feature, or you can look for your question among the *Common Questions*.

Also, at the top of the Help Center, there is a *Local Assistance* tab, which lists your ward's Family History Consultants, their phone numbers and their email addresses. They will be happy to assist you if you can't find your answer in the Help Center. (It's part of their calling to provide individualized help in ward members' homes.)

You can also call or visit your local Family History Center, where Family History Consultants will be pleased to help you.

Finally, you can call or email the FamilySearch Support missionaries. You can email them for help using the *Send us feedback* feature at the bottom of most major screens. Or you can call them at 1 (866) 406-1830.

You Can Help Others, Using the Helper Function

You can help others by using the helper function. On the New FamilySearch homepage, click on *Sign in to Help Someone Else*. In the pop-up screen, the person you are helping will enter his name (as it appears on his membership record), birth date, and the last 5 digits of his membership number (which can be found on his temple record or Individual Ordinance Summary). When using the helper feature, all data entered is credited to the person being helped.

Assignments:

1. Click on *Learn How To Use FamilySearch* in the left-hand menu of the New FamilySearch home page. Watch the following Overview (video): *Getting Help*.
2. In the Help Center, briefly practice using the *Search* feature.
3. In the Help Center, click on *Common Questions about the New Family Search* to see the extensive resources there.
4. In the Help Center, click the tab at the top entitled *Local Assistance*. This will list your ward's Family History Consultants, their phone numbers and email addresses.
5. In the Help Center, click the *Training & Resources* tab at the top. Go into the New Family Search e-Learning Course, and review segment # 6 entitled *Using Help*.

Note: to exit the Help Center, click on *Close Help Center* in the upper right-hand corner.

Additional Resource: Chapter 1 of *A User's Guide To The New FamilySearch*.

Step 4. Map out a plan for working with your family tree.

- a) It is easy to get lost in a large family tree and not know which branches you have worked on and which you haven't. The easiest way to keep track of what you have done is to print off your PAF pedigree chart¹⁶ and check off each nuclear family as you complete it in New FamilySearch.
- b) When you work on a given nuclear family, first work on the father, then the mother, then each of the children.
- c) You need to decide how much of your family tree you will work on. Your lineages in New FamilySearch may stretch back further than your own records. Do you plan to work on New FamilySearch beyond the point of your own research? (Combine records, separate records, clean Summary screens, etc.?) Generally it is best to stay within the bounds of your own research and allow the researchers who submitted the records for earlier centuries to clean those records.

PAF And New FamilySearch: How They Should Work As A Complementary Team

People ask: Now that New FamilySearch exists, do I still need my PAF file? If you have more than a handful of names in your PAF file, the answer is definitely yes!

PAF has its role, and New FamilySearch has its role—the two are distinct but complementary. PAF should represent your personal family history research, while New FamilySearch represents the collaborative family history research. You may not agree with some of the collaborative research, so you can see how the two need to be maintained as distinct databases.

You should upload (copy) the vast majority of your PAF data to New FamilySearch (if it has not already been contributed by you or other contributors). But there is some information you will not want to upload to New FamilySearch. First, you should generally avoid uploading information about living persons. Be especially careful of mentions of living individuals in your PAF notes of deceased relatives. Also, there may be confidential information about deceased individuals (divorces, family feuds, crimes, insanity, etc.) which you would not want to upload. Don't upload info to New FamilySearch concerning decedents born in the past 95 years if the closest living relative would not want temple work done. (See page 28.)

Similarly, you should not download (copy) all the records in your New FamilySearch family tree to your PAF file. If your personal family history research ends in the year 1800, don't copy the New FamilySearch records back to 1600. Define your PAF file as your personal research, distinct from the collaborative family tree research. There is no benefit to copying all

Don't copy all the records in your New FamilySearch family tree to your PAF file.

¹⁶PAF (Personal Ancestral File) is a software program which records your family history on your home computer. If you don't have a PAF file, you could print off your pedigree chart from New FamilySearch. If you use Ancestral Quest, RootsMagic, Legacy, or any other family history computer program in place of PAF, the discussion in this Step equally applies to you.

those records into your PAF file, and you could never keep your copy up-to-date. They will be available (with all the latest research) on New FamilySearch anytime you want to peruse them.

You have millions of ancestors. Even if you just go back to the year 1500, you may have 100,000 members of your ancestral families. If you spent your entire mortal life performing genealogical research, you could never build your entire family tree alone. So define your niche, and let PAF chronicle your niche. Then, let New FamilySearch serve as a superstructure over your niche, expanding the family tree beyond the bounds of your personal research.

If you feel the absolute need to download lineages past the point of your personal research, it would be wise to use a separate PAF file, apart from your personal research PAF file. But you will never be able to keep it up-to-date, as your New FamilySearch family tree will change almost daily, so it is a wasteful effort to try to copy beyond the bounds of your personal research.

Don't upload a GEDCOM into New FamilySearch.

New FamilySearch allows you to upload GEDCOM's. (A GEDCOM is a file of genealogical data, which might hold anywhere from one family to thousands of families.) New FamilySearch requests that if you upload GEDCOM's, you upload only small GEDCOM's containing names which are not presently in New FamilySearch. (The Catch-22 is that it is difficult to build GEDCOM's containing only names not present in New FamilySearch!)

As a general rule, it is best **not** to upload GEDCOM's into New FamilySearch, as it will almost invariably create duplicate records. When you upload a GEDCOM, New FamilySearch will compare your records with its records to attempt to avoid duplicates, but wherever there is any gray area (additional or conflicting data)—and there is invariably a great amount of gray area—then New FamilySearch must default to creating a new record, thereby creating many duplicate records in the process.

It will take you longer to combine all the duplicate records you create via a GEDCOM upload than it would take to synchronize your PAF file with New FamilySearch. (Synchronization is explained in Step 13.) So, it is far better to synchronize than to upload a GEDCOM.

Assignments:

1. Formulate a plan for working with New FamilySearch. Decide:
 - a) how much of your New FamilySearch family tree you will clean up (the portion that corresponds to your own research?),
 - b) how you will keep track of the work you have done (by checking off families on a copy of your pedigree chart?), and
 - c) what information you will copy from New FamilySearch to your PAF file (data on nuclear families already in your PAF file?).
2. Also, briefly review the following Guides (publications) at *Learn How To Use FamilySearch: Printing A Family Pedigree and Family Group Record, A Member's Guide to Temple and Family History Work.*

Step 5. Combine all the records for the individual.

There is a great amount of duplication in New FamilySearch, since it includes all the submissions to several different databases (about 1 billion records), including the temple records, Four Generations Program, Ancestral File, Pedigree Resource File, and the LDS membership records.

You cannot ascertain whether someone's temple ordinances have been performed until you have combined all the records for the person.

Records are combined by placing them in a folder (called the Combined Record); the individual records remain intact within that folder. Thus, New FamilySearch *combines* records, it doesn't *merge* records. (That permits them to be separated if they were incorrectly combined.)

You can view the individual records contained in a person's Combined Record by clicking on *Combined records* at the bottom of the Details screen.

Screens from which you can combine records:

Possible Duplicates screen

Spouses And Children screen:

Combine spouses (by clicking the option button in front of the spouse's name)

Combine children (by clicking the option button in front of the child's name)

Parents And Siblings screen:

Combine parents (by clicking the option button in front of the parent's name)

Combine siblings (by clicking the option button in front of the sibling's name)

* (in front of a set of parents on the pedigree chart): Click the asterisk.

Advanced Search (from the Possible Duplicates screen).

Some records cannot yet be combined. (The limit is 150 records per Combined Record.) If you have two membership records, click the link to request the Membership Dept. to combine them.

Use Family Relationships As Your Primary Guide In Combining Records

Family relationships are the crucial element of New FamilySearch and the best guide to combining records. Birth and death data are helpful, but are of secondary significance. If the relationships are correct, the rest of the data is less importance and can be corrected later.

When combining records, family relationships are more important than dates and places.

Tip: As you are combining records, keep your PAF file open, so you can compare the New FamilySearch records with your PAF data.

Combine Records Pertaining To The Same Individual, Even If Some Data Is Erroneous

When comparing records, some of the dates and places and the spellings of names may be incorrect. Don't reject a record due to errors.

When combining records, ask yourself: Are these records *intended* for the same person? Please note that this is quite different than the question: Is the information in the records the same? The information in the records may be notably different, either due to mistakes made by some contributors or due to conflicting data in the historical records pertinent to the same individual. But the criterion for combining records is always whether the records were INTENDED for the same person, even if there are discrepancies in the information.

Combine the records if they were *intended* for the same person, even if some of the data is incorrect.

If you fail to combine records because there are errors in a record, you will never clean your family tree in New FamilySearch. First you combine the records, then you work with other Contributors to clean them. If you don't combine the records, then erroneous records for your family will remain in New FamilySearch indefinitely. Also, you will make it possible for duplicate ordinances to be performed. Even worse, someone might combine your ancestor's record into their family tree, which could eventually cause two unrelated families to be linked. So, please combine the records if they were *intended* for the same person, even if there are errors.

Tip: Both "Yes" buttons at the bottom of the Combine screen do the same thing—they combine the records.

Wrong Parents, Wrong Spouse, or Wrong Gender: See pages 65 - 67 in Appendix E.

When Combining Records, Review All the Data You Can

Combining records is generally the hardest part of working on New FamilySearch. So review as much data as possible.

When comparing records, in addition to comparing the information on the screen, do the following:

- 1) *Place your cursor over the names of the individual's spouse, children and parents.* If the name in both records (in the left- and right-hand sides of the screen) are highlighted, that indicates this is the same person (the same spouse, or the same child, or the same parent). This helps considerably in making the combine-or-not-combine decision.
- 2) *Click on the names for both records.* That will open the individuals' entire record, allowing you to see more information to aid in your decision. When the two full records are open, click on the Spouses And Children screen to see if the marriage data for the two records are similar. Click on the Parents And Siblings screen to see if there are additional

The more information you compare, the better-founded your decision to combine-or-not-combine will be.

- similarities (or differences).
- 3) Similar to # 2 above, *click on the names of the spouses to bring up the spouses' records*. Again, you can look for similarities (or differences) that will help you decide whether the spouse is the same individual. (If the spouse is the same individual, that greatly increases the probability that the two records you are comparing are of the same person. After all, how likely is it that the same Jane Allred married two men both named Thomas Johnson?)
 - 4) Similar to # 2 and # 3 above, *click on the names of the parents and on the names of the children* and go through the same process.

If you are not reasonably certain the records are intended for the same person, don't combine the records.

Sometimes it is very difficult to determine whether to combine two records. In the end, if you are not reasonably certain both records were intended for the same individual, don't combine the records.

<p>Rule of thumb: If you are not sure, <i>don't</i> combine the records.</p>

You can always visit the decision again later, when you might have more information. Or, someone else might have more data and thereby be able to make a more-informed decision. In the end, someone created each record, so if you just don't know what to do, let the person who created the record decide for whom he intended the record.

Tip: During this stage, don't take time to copy data from your PAF file into New FamilySearch. (And don't take time to copy data from New FamilySearch to your PAF file.) You will be able to quickly copy data from PAF to New FamilySearch and from New FamilySearch to PAF during Synchronization (Step 13), and there won't be any typos that way.

Do Not Combine New FamilySearch Records Utilizing Third-Party Software

The third-party software firms advertise that you can combine records and separate records in New FamilySearch using their software. I advise against doing so at this time. In Family Insight, Ancestral Quest, or RootsMagic, you generally cannot see as much information as you can when you are working directly in New FamilySearch. When you see less information, you make a less-educated decision. Thus, you can do a better job of combining and separating records directly on the New FamilySearch website than you can using third-party software. (In the future, this will likely change, as the third-party vendors continue to expand the features of their programs.)

Assignments:

1. Review the following two Overviews on the *Learn How To Use FamilySearch* tab:
 - Resolving Possible Matches*
 - How Combining An Individual's Information Affects Your Family Line.*
2. In the Help Center, review e-Learning Course segment #2 *Combining and Separating Records*.
3. Do Steps 5, 6, 7 and 8 for an individual before going to another individual.

Additional Resource: Chapter 6 in *A User's Guide To The New FamilySearch*.

Step 6. Separate out any records from the individual's Combined Record which don't pertain to him.

Combining records is like placing sheets of paper in a manila folder—the original records remain unchanged inside the folder. This is so a record can be removed from the folder if it is determined the record was placed in the wrong person's folder (Combined Record).

In addition to the records you combine, other records have been combined into your ancestors' folders (Combined Records) by other patrons, and some were combined automatically by the computer. Sometimes a record for a person by the same name, perhaps a son or cousin, may have been mistakenly combined into your ancestor's Combined Record.

Therefore, when you finish combining an ancestor's records, you should review the individual's data to see if any information looks extraneous. If so, go inside the Combined Record and review the individual records to see if any record does not pertain to your ancestor.

To go inside the Combined Record to see the individual records, go to the Details screen, and click on *Combined records* at the very bottom of the screen. This will open a screen which displays all the individual records for that person.

If you identify a record that does not pertain to your ancestor, click the small box next to the Record Number and then click *Separate Selected Records*. That will remove the record from your ancestor's Combined Record. (The separated record remains in New FamilySearch, but is not linked into your ancestor's Combined Record.) If you separate out two or more records, they are placed in a new Combined Record separate from your ancestor's Combined Record.

Don't separate out records just because some of the information is incorrect.

Even if some of the data is erroneous, if a record was *intended* for your ancestor, it should remain in your ancestor's Combined Record. You can then work with the Contributor of the erroneous data to correct it. (See Step # 16.)

An IOUS (Individual Record of Unusual Size, consisting of more than 150 records) can possibly be separated in Family Tree at labs.familysearch.org. Open the folder of the IOUS, and click on Records. Then click on the boxes next to the records you want to move; next click the Move Selected Records button. Then create a new folder, or just click each record and drag each one to a folder that has already been created. (Per Document 106453.)

Trouble-shooting: Appendix E explains how to resolve incorrect gender, incorrect sealings, incorrect relationships, total mixups of family members, and how to quarantine problem records, including perpetual loops and hijacked records.

Assignment: Do Steps 5, 6, 7 and 8 for an individual before going to another individual.

Additional Resource: Pages 126-128 of Chapter 6 of *A User's Guide To The New FamilySearch*.

Step 7. Clean the individual's Summary screen.

Sometimes, after combining an individual's records, his name may look strange in the pedigree chart. You can correct this by cleaning up his Summary screen. On the individual's Summary screen, there is a down arrow next to his name. Click on the down arrow, and a drop-down box will appear from which you can select the form of his name to be displayed both on the Summary screen and on the pedigree chart. (The alternatives come from the Details screen.)

By the same means you can select which birth data and which death data is to be displayed on the Summary screen.

Cleaning the Summary screen is your opportunity to declare to everyone which opinion in the Details screen is correct.

You will edit primarily in Step 11, but we will explain editing and adding data now, in case you need to do so in order to clean the Summary screen properly.

Editing data in an existing record

Click on the *Edit* button next to the data you want to edit. (There are *Edit* buttons in the Details screen, and in the marriage data boxes in the Spouses And Children screen and in the Parents And Siblings screen.)

Only the person who contributed the data can edit or delete it. But you can add another opinion about an existing person in New FamilySearch by clicking the *Edit* button.

Adding data to an existing record

If there is no information in the field, there will be an *Add* button.

If you disagree with information contributed by another Contributor, you can add another opinion by clicking the *Edit* button next to the field. Next, click *Add Another Opinion*. After you add your data, you will see both the information contributed by the other Contributor and the data you contributed.

Adding fields

You can add fields for a great variety of purposes, such as Nicknames, AKA, Titles, Burial, Christening, Occupation, Religious Affiliation, Immigration, Military Service, Mission, Probate, Stillborn, Tribe Name, etc.

Add another Name field rather than put multiple forms of a name, such as a nickname or alternate spelling, in the Name field.

To add a field, go to the bottom of the Details screen, and click *Add information*.

Examples: If the individual used more than one form of his name, you can add additional Name

fields.¹⁷ If there are contradictory documents concerning his birth date or death date, you can add additional Birth or Death fields.

Names

When you enter a person's name, New FamilySearch asks you to identify the name parts as Title¹⁸, Given Name, Last Name, or Suffix. This allows New FamilySearch's search engine to treat the name correctly.

New FamilySearch accommodates names written in the Cyrillic and Greek alphabets, and Chinese, Japanese (kanji and katakana), Korean, Cambodian, Laotian, Thai, Viet, and other scripts. It also understands Hispanic surname conventions.

Standardized Places and Dates

It is very important to utilize standardized places and dates, so the search engine will quickly and correctly understand your data. To do so, use the drop-down menu which will appear when you begin typing a place or date. Always select an item from the drop-down menu; never type in the full place yourself.

Always select place names and dates from the drop-down menu.

Follow the Guidelines for entering names, dates and places

New FamilySearch has very specific guidelines for entering names, date and places. (Remember, there are a billion records in New FamilySearch! For the search engine to properly understand your data, you must enter it according to New FamilySearch's guidelines.)

The guidelines are given in Appendices A, B and C of *A User's Guide To The New FamilySearch*. These guidelines are largely different from the guidelines we used in PAF; they are designed to accommodate the search engine and the large size of the New FamilySearch database. You should have a copy of the guidelines, learn them, and use them. (Thanks!)

Print out and use the guidelines for entering names, dates and places.

Notes and Sources

For Notes and Sources, please see Step 11 (page 31).

¹⁷Example: If a man used the name Heinrich in Germany but anglicized it to Henry when he immigrated to the U.S., enter each form of his name in a separate Name field. If he used the nickname Harry, enter it in a Nickname field. The computer can then search on each variant.

¹⁸You can enter a person's title, such as Count or Colonel or Doctor, either in the Name field or in a separate field for Title, which you add by clicking on *Add Information* at the bottom of the Details screen.

Assignments:

1. Review the following Overviews (videos) on the *Learn How To Use FamilySearch* tab:
Adding Information About Individuals And Families
Making Corrections To FamilySearch.
2. In the Help Center, review e-Learning Course segment # 3, *Displaying Correct Information.*
3. Print and study Appendices A, B and C of *A User's Guide To The New FamilySearch.*
4. Do Steps 5, 6, 7 and 8 for an individual before going to another individual.

Additional Resource: Chapter 3 of *A User's Guide To The New FamilySearch.*

Step 8. Declare yourself the Legacy Contributor of previously-submitted records, where appropriate.

If you contributed names for temple work or to the Ancestral File, Pedigree Resource File, or Four Generations Program, you should declare yourself the Legacy Contributor of those records. Also, if your deceased parents or grandparents (and your deceased aunts or uncles, if their children are not interested in becoming the Legacy Contributor) contributed records to these earlier databases, you can declare yourself the Legacy Contributor of the records they contributed.

All records need a Legacy Contributor, so we can clean up erroneous records.

A Legacy Contributor can make corrections to these records.

So, go to the individual's Details screen and look at the name of each Contributor. (If the Contributor is listed as *Multiple*, click on *Multiple* to see who the individual Contributors were.) If you recognize your name (or the name of a deceased relative), click on the name and then click on the link entitled *Declare This Legacy Contributor as Yourself*. A screen will appear from which you can send a message (email) identifying yourself as the Legacy Contributor.

Tip: You probably contributed several records at the same time. Each contribution—not each record—will have a unique code bearing your name and a computer-generated number. You need to declare each code that pertains to you. Keep a list of which codes you have declared.

Tip: As you identify records you submitted, review your submitted data to see if you need to correct any information. Keep a log of the individual, Person Identifier number, and corrections that need to be made, so you can make the corrections in Step 11.

Also, please make your email available to other users, so we can work together in cleaning up the records.

Assignment: Do Steps 5, 6, 7 and 8 for the individual before moving on to another individual.

Additional Resource: Pages 84-86 in Chapter 4 of *A User's Guide To The New FamilySearch.*

Step 9. Search for family members missing in New FamilySearch.

If New FamilySearch is missing a member of the nuclear family you are working on, you should search for a record for the person and link the individual into his/her family.

Always search for an existing record before considering creating a new record.

You can search for a deceased person by clicking:

Add or find a child or *Add or find a spouse* in the Spouses And Children screen,
Add or find a sibling or *Add or find a parent* in the Parents And Siblings screen,
Add or find husband or *Add or find wife* in the pedigree chart, or
the *Search* tab above the pedigree chart.¹⁹

Beware: Some patrons connect ancestors into the wrong place in their family tree because they use the wrong link. For example, don't use *Add or find a spouse* to link in a person's mother.

If you find an existing record in New FamilySearch's database for the missing family member, link the record into your family tree, *even if some of the data may be erroneous*. Remember what we said about combining records; the same principle applies here—if the record was *intended* to represent your ancestor, link the record into the family tree. Otherwise, you will create an unnecessary duplicate record, and you will run the risk of duplicating temple ordinances which may be recorded on an existing record in New FamilySearch.

Also, you will want to perform Steps 5, 6, 7 and 8 for the individual (combining and separating records, cleaning the Summary screen, and, perhaps, declaring yourself a Legacy Contributor).

Tip: If you can't find a record, re-try with less info in the search screen (perhaps just the name and birth year), for a broader search. Also try name variations, etc.

Tip: If you can't find a record in New FamilySearch for a missing family member, you should create a new record—but you don't necessarily need to do it at this time. If it is a direct ancestor, you will want to create the record now so you can see if you can continue to expand that lineage in New FamilySearch. But if the missing individual is a sibling of your direct ancestor, then you can wait until Step 13 (Synchronization) to copy your PAF record to New FamilySearch. You will be able to do so more quickly and without the risk of typos.

Tip: Similarly, if New FamilySearch lists family members who are not in your PAF file, don't take the time to copy the data to your PAF file at this time. You can do that faster (and without the risk of typos) in Step 13 (Synchronization).

Assignments: 1. In the Help Center, review e-Learning segment # 4 *Adding Missing Individuals*.
2. Do Steps 9 and 10 for a nuclear family before moving on to another nuclear family.

¹⁹From the *Search* tab above the pedigree chart, you can find the record, but you can't link it into your family tree, because the computer doesn't know where you want to link the record.

Step 10. Reserve family members for temple ordinances.

Locations of temple ordinance data:



- a) LDS Ordinances screen in an individual's record.
- b) Family temple ordinance screen. (To find this screen, click the temple icon on the pedigree chart, or in the Parents And Siblings screen, or in the Spouses And Children screen.)
- c) Individuals I've Submitted For Temple Ordinances screen. (To find this screen, click the *Temple Ordinances* tab above the pedigree chart.)

These screens give the status for each ordinance. The various statuses²⁰ are:

Not Available – For privacy reasons, Living Persons' ordinances cannot be seen.

Not Needed – Children who died before age 8 do not need Baptism or Endowment.

Born in the Covenant – Sealing to parents not needed.

Needs More Information – Clearing for ordinances cannot occur without more data to uniquely identify the individual.

Not Ready – One year has not passed since the individual's death.

Ready – The record meets the minimum requirement to uniquely identify the individual and therefore can be taken to the temple.

Reserved – The name has been reserved for ordinances. No one else can reserve this individual. (You can see who reserved the name in Family Tree. See page 28.)

In Progress – The Family Ordinance Request (FOR) has been printed for the ordinances for this individual.

On Hold – Ordinances should be done in order, i.e. baptism before endowment. An FOR has been printed for the prior ordinances, so the later ordinances are On Hold until the prior ordinances are completed.

Completed – The ordinance has been performed.

Since, at this point, you have ensured that all the records for the individuals in the nuclear family you have been working on have been combined, you are ready to reserve members of this nuclear family for temple ordinances (if they have not yet been performed).

Never reserve names for the temple without ensuring all the records for the individual have been combined. Otherwise you don't know whether the ordinances have already been performed.

Temple Icons

Family Pedigree with Details has 3 temple icons; *Family Tree* has 4 temple icons. In both

²⁰Appendix D of *A User's Guide to the New FamilySearch* provides more in-depth explanations of the ordinance statuses.

pedigree charts:

A green arrow pointing to a temple means someone's ordinances have not been completed.

A check mark by a temple means all the family's ordinances have been completed.

A caution sign next to a temple means:

In *Family Pedigree with Details* the ordinances are reserved, or more data is needed.

In *Family Tree* more data is needed or someone has not been deceased for a year.

In *Family Tree* a padlock next to the temple icon means the ordinances have been reserved.

Reserving Temple Ordinances

The process is *very* easy. Click on the temple icon for the family in the pedigree chart. If there are family members who need temple ordinances, you can reserve them by clicking the *Continue* button. Next, you will need to click the small box stating you are abiding by the Church's policies governing the submission of names for temple ordinances. (It's good to occasionally click on *Church policies* on this screen and read the Church policies governing the submission of names.)

Next, you click the *Add To Temple Ordinances List* button. This will reserve all "Ready" ordinances for all members of this nuclear family.²¹ Once you have reserved names, no one else can reserve them, to prevent duplication.

Please don't reserve names of individuals for whom you know virtually nothing.

Even if the computer says the name is "Ready," the person taking the name to the temple—you have a moral obligation to know from your own research or from the research of a person whom you trust that 1) the individual actually existed, and 2) the relationships that will be sealed are correct.

List of Reserved Names

When you click the *Temple Ordinances* tab above the pedigree chart, a screen opens which lists all the names which you have reserved for temple ordinances. For each individual in the list, the screen indicates whether each ordinance (Baptism, Confirmation, Initiatory, Endowment, Sealing to Parents, and Sealing to Spouse) is Not Available, or On Hold, or the ordinance request is Not Printed, or Printed, or the ordinance is Completed.

This screen also allows you to reassign ordinances to the temple (to be performed by other temple patrons) by clicking *Reassign* next to your name. You can also re-assign them back to yourself.

²¹If, for any reason, you don't want to submit the name of one of the members of the family, you can Remove the name of that individual: Click the *Temple Ordinances* tab above the pedigree chart; click the small box in front of the individual's name; click the *Remove* button, and the individual's name will be removed from your list of names submitted for ordinances.

The screen also allows you to *Unreserve* an individual.

When you are ready to take names to the temple, you need to print a Family Ordinance Request (FOR). To print an FOR, simply check the boxes in front of the names whom you wish to include in the FOR. You can include up to 50 people in one FOR. Then click the *Print or Reprint Request* button. A PDF file will open; print the FOR by clicking on the small printer icon in the upper left-hand corner. Or you can save the FOR to your harddrive and then send it as an email attachment to a relative, to let him do the ordinances. (You may want to wait until after Step 11 to print an FOR, if you need to correct names in Step 11.) If you have lost the FOR, you can reprint it by the same means.

The FOR contains a barcode, which the temple's family file department will run under a barcode reader, which will identify the print request from the New FamilySearch website. From that, the blue, pink and off-white ordinance cards with which you are familiar will be printed.

Perform Temple Ordinances in Order

Please perform the temple ordinances in their correct order: Baptism, then Confirmation, then Initiatory, then Endowment. After both husband and wife are endowed, they can be sealed. Children should be sealed to their parents only after the parents have been sealed together.²²

You Can See Who Reserved Names for Temple Ordinances

As of December 2009, you can see who reserved an ordinance by looking at the person's LDS Ordinances screen. If you need to contact the patron (if you know the ordinances have been done or should not be done) and he has provided his email address, you can do so.

Obey Church policies concerning submission of names for temple ordinances.

Two of the most prominent policies are:

1) *If the decedent was born in the past 95 years, you must obtain permission from the closest living relative²³ to perform temple ordinances, in order to respect the wishes of the family.*

2) *Do not submit names of famous people or Holocaust victims who are not your close relatives.*

<p>Please learn and follow the Church policies for submitting names for temple ordinances.</p>

Widespread violation of Church policies could turn public sentiment against the Church. The vicarious baptism of President Obama's mother in early 2009 caused bad press for the Church.

²²If, in the past, ordinances were performed out of order, they are not invalid, but the subsequent ordinances did not take effect until the prerequisite ordinances were performed.

²³Closest living relatives are, in order: an undivorced spouse, an adult child, a parent, then a brother or sister.

Obedying Church policies will avoid many such problems.

You should print out and read *Policies for Preparing Names for Temple Work*, a guide located under the *Learn How To Use FamilySearch* tab on the New FamilySearch home page.

Teach your ward members not to surf the pedigree chart looking for “Ready” if they know virtually nothing about the individuals.

This is a common mistake made when one first begins using New FamilySearch and discovers the possibility of easily reserving numerous names for the temple. The mistake is made with good intentions—the patron simply wants to make the blessings of temple ordinances available to others. But one should never “surf the pedigree chart” indiscriminately.

First, you don’t know whether the records for the individual have been combined yet. If they haven’t been, the temple ordinances may have already been performed.

Second, “pedigree surfers” often know little or nothing about the individuals in question. They may not even know whether they actually existed.

Irrespective of whether a record says “Ready,” if you are going to take a name to the temple for sacred eternal ordinances, you have the moral responsibility to determine either by your own personal research or by the research of someone you trust that 1) the individual did exist, and 2) the relationships you will seal are correct.

When a record says the individual is “Ready,”²⁴ that does not mean New FamilySearch has magically verified the record is accurate, or even that it has been ascertained that the individual actually existed. That is the responsibility of the individual who takes the name to the temple. “Ready” simply means that sufficient information has been provided to uniquely identify the individual; that information may or may not be accurate. While most of the genealogical data that was submitted through the Four Generations Program, Ancestral File, and Pedigree Resource File was correct, we know some of it is downright wrong. Please don’t be guilty of performing invalid ordinances which are disrespectful to the Lord’s great plan.

Don’t resubmit names for temple ordinances just because names were spelled wrong or birth dates or places were off.

We baptize people, not birth dates, not birth places, nor even names. Prior to New FamilySearch, we attempted to identify an individual in time and space—with a birth date

Don’t re-do ordinances for spelling mistakes or wrong birth data.

²⁴New FamilySearch is a relationship-based system for clearing names for temple ordinances. The computer will indicate an individual is *Ready* for temple ordinances if he is deceased and his name, gender, and relationship to a known individual in the family tree have been identified. But the data is only as accurate as the patron’s research.

and birth place. New FamilySearch takes a totally different approach—it is relationship-based. In effect, we have returned to the old Biblical pattern: Adam begat Seth, who begat Enos, who begat Cainan, who began Mahalaleel, who begat Jared, who begat Enoch. The Bible never gave birth dates or birth places—that data wasn’t really important. What was important was the relationships, and that is the basis of New FamilySearch. If the relationships are correct, the birth dates and birth places and even the name spellings and name variations can be substantially wrong without invalidating the ordinances.

A User’s Guide To The New FamilySearch addresses the question: “Do Minor Errors in Names or Event Information Make an Ordinance Invalid?”

“Minor errors of information do not affect the validity of ordinances.

“Ordinances for the dead become effective when the deceased person is qualified and chooses to accept them (see D&C 138:19, 32-34). Ultimately, the validity of all ordinances is decided beyond the veil. We can only do our best to give our ancestors the opportunity to receive ordinances.

“You can correct the information about the individuals in the new FamilySearch, but you do not need to redo the ordinances. For example, ordinances are still valid and sealings are still in effect, even if an individual’s birthday is wrong, or a name is misspelled, or a place of death is wrong. The individual’s genealogical record can be updated with the correct information.”²⁵

A User’s Guide To The New FamilySearch defines “When Do Ordinances Need to be Redone?”

“Ordinances for the deceased need to be redone under a few circumstances.

“They were for the wrong individual or couple.

“They were done for the wrong gender.

“They were done [vicariously] while the individual was still alive.”²⁶

But if the individual was deceased and the gender was correct, and the only concerns are name variations and dates and places, you should not re-do the ordinance if the person for whom the record was *intended* can be identified with reasonable certainty. Go ahead and correct the information, but don’t re-do the ordinances.

New Changes to Temple Qualification Rules

As of December 2009, there will be two new changes:

1. In addition to the other information required for temple ordinances to be performed, a person’s record must now have a standardized place of birth, christening, marriage, death, or burial. The place name must contain at least a country.

²⁵*A User’s Guide To The New FamilySearch Web Site* (August 2009), pages 177-178.

²⁶*A User’s Guide To The New FamilySearch Web Site* (August 2009), page 177.

2. Quotation marks (“”), parentheses (), and slashes (/) can no longer appear in the Name field. Numbers can appear in the name only if they are a Suffix. (Select a name for the Summary screen which does not have these marks. Nicknames should be placed in a Nickname field, and alternate forms of a name should be placed in additional Name fields. See Step 7.)

Assignments:

1. Review the Overview *Doing Temple Ordinances For Your Ancestors* under the *Learn How To Use FamilySearch* tab on the home page.
2. In the Help Center, under the *Training & Resources* tab, review e-Learning Course segment # 5, *Doing Ordinances for Deceased Ancestors*.
3. Review the following Guide (publication) under *Learn How To Use FamilySearch: How To Submit Names to the Temple Using the New FamilySearch*.
4. Print and study *Policies for Preparing Names for Temple Work*, accessible from the *Learn How To Use FamilySearch* tab on the home page.
5. Do Steps 9 and 10 for a nuclear family before moving on to another nuclear family.

Additional Resource: Chapter 7 of *A User’s Guide To The New FamilySearch*.

Step 11. Correct erroneous data you submitted in past years.

In Step 8, you compiled a list of data you submitted in previous years which you now realize need to be corrected. After FamilySearch recognizes you as the Legacy Contributor, please make those corrections.

You may also need to make changes in the Summary screen. (See Step 7.)

Step 7 provided information about editing and adding data. You may want to review that information (on pages 22 - 23) again.

You should standardize the data in the records you submitted in the past, utilizing the guidelines for entering names, dates and places given in Appendices A, B and C in *A User’s Guide to the New FamilySearch*.

Notes

You can read, add, edit, or delete Notes.

An individual’s Notes can be accessed from either the Summary or Details screen.

A family’s Notes can be accessed from either the Spouses And Children screen or the Parents And Siblings screen.

Wise family historians use the Notes field extensively, both in their PAF file and on New

FamilySearch. You can place anything of genealogical value in the Notes field that doesn't fit in the standard fields. Examples: places of residence, the individual was a twin, he changed his name when he came to the U.S., he was a Civil War soldier—list his regiment.

Sources

You can read, add or edit Sources, which can be accessed from either the Summary or Details screen. However, don't spend time entering your sources into New FamilySearch at this time. The Sources section is being revamped. (The Church is working with major archives to develop a standardized digital source format, so archives will be able to submit large amounts of information into New FamilySearch with an automated source attached.) So, wait until the new format for Sources has been completed before entering your sources. However, *keep a good record of your sources in your PAF file.*

Don't spend time entering your sources now, since the Sources section will be changed.

Biological and Adopted Relationships

You can show a child as a biological or an adopted child. (You can do so by clicking *View relationship details* at the bottom of either the Spouses And Children screen or the Parents And Siblings screen, and then click *Edit* next to the relationship.)

You Can Delete Your Own Data And The Records You Submitted

If you contributed incorrect data or if you contributed duplicate or incorrect records, you can delete them. (You cannot delete or edit data contributed by others.)

Some ancestors are called IOUS (Individuals of Unusual Size), because they each have hundreds or even thousands of records in their

Combined Record. This is primarily the result of hundreds or thousands of descendants all submitting the individual in their Pedigree Resource File GEDCOM's. Often, the records are identical, as GEDCOM's were passed around from relative to relative. If your record for an ancestor contributes no unique data, it would be *very* helpful if you would delete your record, to reduce the extremely large size of the Combined Record of the IOUS.²⁷

Let's reduce the size of IOUS.

²⁷*You can do so if you are the sole contributor of the individual record.* Write down the Person Identifier of the individual record you will delete. Then separate the record from the ancestor's Combined Record—See Step 6 to do so. Next, go to the Spouses And Children screen of the individual's father. You should see the record you separated out as a duplicate among the list of children. Identify which of the two duplicate records with the same child's name is the one to be deleted by checking the Person Identifier. On the Spouses And Children screen, click the option button in front of the record to be deleted. From the drop-down box, select *Delete or Dispute Individual*. Then click *Delete*. Then click *Done*.

Step 12. Make the necessary preparations for Synchronizing your PAF file with your New FamilySearch family tree.

Synchronization will allow you to selectively upload (copy) data from PAF to New FamilySearch and to selectively download (copy) data from New FamilySearch to PAF.

Preparatory Steps Preceding Synchronization

Before you can synchronize, you must:

- 1) Combine all the records for your ancestors in New FamilySearch. (You did this in Step 5.)
- 2) Be sure you utilize standardized places (and standardized dates) for all data you key into your ancestors' New FamilySearch records. Also, if you include titles in names in New FamilySearch, be sure to designate that portion of the name as a title. (You did this in Steps 7 and 11.)

Now you need to prepare your PAF file by adjusting the data to conform with the data entry guidelines of New FamilySearch (so the information you copy into New FamilySearch can be properly understood by New FamilySearch's search engine). You need to do the following three tasks:

- 3) In your PAF file, move all nicknames and additional name variants from the Name field to a second Name field.

To create another Name field, when you are in your PAF record, click *Options*, then click *New Event/Attribute*, then click on either *Name* or *Additional Name*. (If your PAF lacks these fields, update to Version 5.2.18.0 by clicking *Help*, then *Check For Software Updates*.)

Example: If your PAF record gives the name as John Peterson OR Pederson, leave John Peterson in the Name field and create another Name field for John Pederson. When you upload the record into New FamilySearch, the search engine will be able to search correctly on both name variants.

- 4) In your PAF file, make sure you do not have double dates or other non-standardized data in the date fields.
- 5) Standardize the names of places²⁸ in your PAF file, utilizing Family Insight. This is a rather quick process and well worth the time. (This procedure is explained below.)

²⁸In PAF, we traditionally listed the cemetery in the burial field. New FamilySearch asks that you not do so, as a cemetery name is not part of a standardized place name. New FamilySearch suggests you identify the cemetery in the Notes. If you have time, you might make this adjustment to your PAF records; otherwise, you could correct this in New FamilySearch at a later date. (Burial data is generally less crucial than other data.)

Standardize Place Names, Utilizing Family Insight²⁹

You can purchase Family Insight from Ohana Software for \$25, through a link on the sign-in page of New FamilySearch (in the lower right-hand corner). Or, try Family Insight's free trial offer.

Alternatively, you can utilize Family Insight on a computer at your local Family History Center. To do the latter, backup your PAF file on a flashdrive. When you get to the Family History Center, restore the backup file. That will give you a .paf file to work with. (When you finish your session at the Family History Center, backup your file on your flashdrive; when you get home, you can restore the backup file on your home computer to view the modified PAF file.)

First, go into Family Insight.

Family Insight will search the drives of the computer and list all the PAF files it can locate. Click on your PAF file.

A Family Insight screen will appear. Click on the *Edit Places* button.

Family Insight will then ask you to type in your New FamilySearch Username and Password. (Family Insight will access New FamilySearch's file of standardized place names and compare your PAF place names to this list.)

In the left half of the screen, Family Insight will alphabetically list the place names that are in your PAF file and the number of instances of each in your PAF file. If the place name is a standardized place name, you will see the word *Recognized* to the left of the place name. If the place name is not a standardized place name, you will see the expression *See Suggestions* to the left of the place name.

When you click on a place name, the suggested place names will appear in the right half of the screen. (These are taken from New FamilySearch's list of standardized place names.) You can then peruse these suggestions and select the one you feel is most appropriate. When you click on one of these suggested place names, all the instances of the unrecognized place name in your PAF file will be changed to the standardized place name you selected.

You then continue to the next unrecognized place name and do the same.

Tip: Standardization is generally a quick and simple process. However, if you do not have the name of a county in your PAF place name, you might have to do some research to determine which of the suggested place names represents the location intended by your PAF place name. The bottom left-hand portion of the screen will list the names and RIN Numbers of the record(s) in which the place name appears. Jot down the place name and the RIN numbers, so you can return and insert the county name later, after you have researched it.

²⁹RootsMagic and Legacy Family Tree also provide assistance in standardizing place names, although they don't specifically utilize New FamilySearch's list of standardized places.

Tip: Sometimes while you are standardizing place names, you may want to add a Note to a record or in some other way edit a PAF record. (For example, if the standardized place name is not as specific as the place name in your PAF record, you can preserve the specific place name by creating a Note in your PAF record.) You can do so by clicking on the individual's name in the bottom left-hand portion of the screen. You will then see the record in the bottom right-hand portion of the screen. To add a Note or other Event, click *New*.

Tip: If your PAF record lists Town, County, State, Country, and the standardized place names list only offers the County, State, Country, you are generally safe to leave your place name as it is. New FamilySearch will almost always understand the location and use the County, State, Country from its standardized place names list, without you modifying the place name in your PAF record.

Don't attempt to synchronize your PAF file with New FamilySearch until you have completed all the necessary preparations. Some patrons are jumping into synchronization prematurely. The necessary preparations must be performed, or you will actually create work for yourself in the long run.

Assignments:

1. Complete the necessary preparations for Synchronizing your PAF file with New FamilySearch.
2. Read Chapter 6 of this manual before choosing a software program.

Step 13. Synchronize your PAF file with New FamilySearch.

Synchronization allows you to selectively copy data from PAF to New FamilySearch and from New FamilySearch to PAF.³⁰

Don't upload a GEDCOM into New FamilySearch.
(See page 17 for the reasons why.)

You can synchronize your PAF file with New FamilySearch by utilizing Ancestral Quest or Family Insight or RootsMagic 4, and by the end of the year Legacy Family Tree. Chapter 6 of this manual discusses and compares these software programs.

If you are a current user of RootsMagic or Legacy Family Tree, you will naturally want to Synchronize your personal family history file using your current computer program (RootsMagic or Legacy Family Tree). RootsMagic 4 has an excellent, easy-to-use Synchronization feature. Legacy Family Tree expects to have its Synchronization feature available by the end of the year.

³⁰You can generally synchronize everything except Sources. You cannot upload Sources through Synchronization, since the Sources section in New FamilySearch will be revamped. (See pages 31 and 43.)

If you are a PAF user, I suggest you utilize a certified PAF Add-In for Synchronization. Both Family Insight and Ancestral Quest are certified PAF Add-In's with Synchronization features. Ancestral Quest was given the 2009 award for Most Comprehensive Synchronization, so we will describe Ancestral Quest's Synchronization process in this step.

You can purchase a downloadable copy of Ancestral Quest for \$29.95 (with no need for shipping) from a link on the New FamilySearch sign-in page (in the lower right-hand corner). Or, you can utilize Ancestral Quest's free 60-day trial to Synchronize and try out the program.

Alternatively, you can utilize Ancestral Quest on a computer at your local Family History Center. To do the latter, backup your PAF file on a flashdrive. When you get to the Family History Center, restore the backup file. (That will give you a .paf file to work with.)

First, go into PAF. Make sure the PAF file that is displayed is the correct PAF file. (If this is not the PAF file which you want to synchronize, click *File* in the upper left-hand corner; then click *Close*. Then click *File* again and click *Open*. That gives you the opportunity to select your PAF file.)

Click on *Tools* on the toolbar near the top of the screen. A drop-down menu will appear; click on *Ancestral Quest*. Ancestral Quest will open, generally with the pedigree view.

Look up at the toolbar at the top of the screen. Click on *FamilySearch*. That causes a drop-down menu to appear. The drop-down menu includes an *Overview* and a *Tutorial* about synchronizing your PAF file with New FamilySearch. It is wise to take the time to study these.

Clicking on *Overview* will bring up the FamilySearch Overview section of Ancestral Quest's Help section. (In the left-hand column, all of the synchronization topics of Ancestral Quest's Help section appear. The Overview itself is very basic, but the topics listed at the left may prove to be very helpful as a future reference.)

When you click *View Tutorial* on the *FamilySearch* drop-down menu, you will go to the Ancestral Quest website's Learning Center (at <http://www.ancquest.com/Ver12-1Tutorials.htm>). I highly recommend the 55-minute tutorial entitled *Full Training for PAF Users*. (There are also 3 shorter tutorials about the synchronization process, but they discuss functions out of sequence, which could confuse you more than help you.)

After you have reviewed the Overview and the Tutorial, you should return to the *FamilySearch* drop-down menu and click on *Link (Sync) Me* if this is the first time you synchronize your PAF file with New FamilySearch. This will link your record in your PAF file with your record in New FamilySearch by storing your New FamilySearch Person Identifier number in your record in your PAF file. (You only need to link yourself once. Thereafter, you can do incremental synchronizations in the future without needing to Link yourself again.)

In order to *Link (Sync) Me* or perform any other synchronization process, you must sign in to New FamilySearch, which Ancestral Quest will prompt you to do at the appropriate time.

After you have linked/synced yourself, you can click on either *Link (Sync)/Upload Individual* or *Link (Sync)/Upload Groups*. You have the option to synchronize your entire PAF file (which you can do in one work session if your PAF file is just a few hundred individuals) or to synchronize an individual or a selected group of your PAF file.

Throughout the remainder of the synchronization process, you look at one person at a time and decide whether to link this individual (store the individual's New Family Search Person Identifier in the individual's record in your PAF file). You also decide which data in your PAF file you want to upload (copy) into the individual's New FamilySearch record and which data in the individual's New FamilySearch record you want to download (copy) into your PAF file.

Tip: As you are synchronizing, compile a list of the individuals you add to New FamilySearch and a separate list of those for whom you add data that should be adjusted on their Summary screen. (Keep the second list by name and Person Identifier.) You will use these lists in Steps 14 and 15.

You should link/sync a set of parents and then link/sync their children.

Plan Your Synchronization

Before you begin, have a plan. (Review Step 4, on pages 16-17).

1. Don't upload records of Living Persons.
2. Don't upload confidential information.
3. Don't upload records of individuals born in the past 95 years if the closest living relative would not want temple ordinances performed. (See page 28.)
4. Download data for nuclear families who are already in your PAF file.
5. Don't download records that are outside the bounds of your personal research. (See pages 16-17.)

Be Careful When Uploading Notes From PAF To New FamilySearch

Read the Notes³¹ in your PAF file before uploading them to New FamilySearch to ensure you will not upload confidential data to New FamilySearch, nor information concerning living persons.

Subsequent Synchronizations

Ancestral Quest has a *Check for Updates* feature which allows you, after you completed your initial synchronization, to perform an "update" synchronization. (Before you use this feature, it is wise to check for any updates to the Ancestral Quest software.)

³¹Currently Notes are restricted to about 300 characters; this will be increased to about 1,200 characters in early 2010.

Ancestral Quest will look at the New FamilySearch records which you linked with your PAF records. It will identify some New FamilySearch records as *Changed*³² and others as *Not Changed* and others as *Not Synced*.

You can go into the New FamilySearch records listed as *Changed* to see what changes occurred. You may want to download some of the new data in these records to the corresponding records in your PAF file. *This is an extremely important feature to keep track of what is happening in your New FamilySearch family tree.* RootsMagic 4 also has this feature.

Step 14. Reserve names you added during Synchronization.

During Synchronization (Step 13), you compiled a list of individuals you added to New FamilySearch. Now you can click on the families' temple icons in the pedigree chart to reserve these individuals for temple ordinances. To reserve names for temple ordinances, follow the procedures explained in Step 10 (pages 26-30).

Please remember Church policy requires that for decedents born in the past 95 years, you must obtain permission from the closest living relative in order to perform their temple ordinances, in order to respect the wishes of the family. (See page 28.)

Step 15. Make additional adjustments to the Summary screens, as a result of the data you copied from your PAF file to New FamilySearch during Synchronization.

During Synchronization you made a list of individuals for whom you uploaded data that should be reflected on their Summary screen. Make those changes to their Summary screens now.

³²New FamilySearch stores a version date for each record. During synchronization, Ancestral Quest stores the version date of the New FamilySearch record in the linked record in your PAF file. When you do an "update" synchronization, Ancestral Quest compares the New FamilySearch record version date stored in your PAF record to the current version date of the corresponding record in New FamilySearch. If the date has changed, then Ancestral Quest recognizes a change has occurred in the New FamilySearch record.

Step 16. Send emails to Contributors whose data is incorrect. Dispute incorrect information if the Contributor lacks an email address.

You will find a considerable amount of incorrect information in New FamilySearch. We are the “cleanup generation.” We will clean up all the mistakes made in the past.

Only the Contributor of information can edit the data he contributed. So, in this step, we will work with other Contributors to help them correct their erroneous information posted on New FamilySearch.

Working with other Contributors

New FamilySearch is a *collaborative* or *shared* family tree, so our family tree isn’t all ours. We need to work with our relatives as *partners*, not as *competitors* for our family tree. So, first off, we need to commence Step 16 with respect and Christ-like love toward our distant cousins.

The objective of New FamilySearch is that descendants of common ancestors will communicate with each other, that we will share our information and our sources, and that we will jointly analyze the data and come to the truth concerning our ancestors.

So in this Step we will:

- 1) Send emails to other Contributors, particularly when we feel their information is wrong, to share our information and sources with them, with the hope that this communication will result in our ancestors’ records being more accurately reported on New FamilySearch, and
- 2) Dispute data if the Contributor has not listed an email address or other means of contact.

It is best to email a Contributor before considering disputing his data.

No one likes to see their data publicly disputed, so you will generally achieve greater cooperation from other Contributors by sending them a polite email explaining why you believe their data is incorrect. Cite your sources; include the individual’s Person Identifier, and ask the Contributor to correct or delete his data, if he agrees with you.

Don’t dispute information if you can send an email to the Contributor to ask him to correct his information.

Of course, you can do this only if the Contributor provided his email address or other contact data (mailing address or phone). To find a Contributor’s contact data, simply click on his name. Either his contact data will be there, or you will see there is no contact data for him (in which case Disputing is your only remaining option).

Why dispute information?

“Dispute” is perhaps a poorly-chosen term; it is not meant to be argumentative. A dispute in New FamilySearch is simply a declaration for the benefit of other descendants that certain data is incorrect. Disputing is part of the cleaning-up process.³³

How to Dispute

To dispute a name or birth or death data: Use the *Edit* button on the Details screen.

To dispute the marriage date or place: Use the *Edit* button next to the marriage data on the Spouses And Children screen or on the Parents And Siblings screen.

To dispute a child’s relationship to parents: On the Spouses And Children screen or on the Parents And Siblings screen, use the option button in front of the child’s name.

To dispute a marriage relationship between the listed husband and wife: On the Spouses And Children screen or on the Parents And Siblings screen, use the option button in front of the husband’s or wife’s name.

To dispute the existence of an individual: On the Spouses And Children screen or on the Parents And Siblings screen, use the option button in front of the person’s name. Please do not use this function if one of the other Dispute functions can serve the purpose!

Use your pedigree chart to keep track of which families you have done this work for:
To keep track of sending emails and creating Disputes, use a printed copy of your pedigree chart, to check off nuclear families as you complete this work for them.

Please Don’t Create Careless Disputes

Disputes have been lodged recklessly by many patrons. We have even seen Disputes lodged for duplicate records, instead of the Disputer combining the duplicate records!

FamilySearch wants to rein this in. There is even some talk of eliminating the Dispute process if it continues to be abused. FamilySearch will likely revise the Dispute process, to require the Disputer to provide documentation for his Dispute. (See pages 43-44.)

³³There are even occasions when you should dispute your own information. This is appropriate when a family tradition says something you know from documentary sources to be incorrect. Add the incorrect family tradition and then immediately dispute it. The dispute serves as a red flag to your relatives to not enter the incorrect family tradition nor to continue relying on it. Hopefully, over time this will kill off many erroneous family traditions.

WARNING CONCERNING DISPUTES:

When you lodge a Dispute, you reduce the Contributor's ability to edit or delete his record. (It's simply the way it is programmed.) So you may achieve the opposite of what you desired. It is always better to work with the Contributor than lodge a Dispute.

Why an ancestor could be listed as *Living* if he died centuries ago

A person born centuries ago may be shown as *Living* (with no name displayed) if the record has no birth date and no death date. Remember that New FamilySearch is an amalgamation of various earlier databases, including the Four Generations Program, Ancestral File, and Pedigree Resource File. On Family Group Sheets, there was no place to list birth or death data for the spouses of the children in the family. When that data was placed in New FamilySearch, the system necessarily treated those spouses as *Living* by default, since, to abide by privacy laws, anyone lacking both a birth date and death date must be presumed as *Living*.

If you run across such a record, send a polite email to the Contributor, explaining this. The Contributor can correct the problem by adding an approximate birth date or death date, or by deleting the record.

Treat Others With Respect And Christ-like Love

New FamilySearch is a collaborative effort. Any time people work together, it is natural for there to be conflicts. Our feelings toward our ancestors are very emotionally-charged; that often causes us to become angry if others have messed up our ancestors' records, particularly their temple records. But we need to remember that we are all sinners and will not be able to return to Heavenly Father's presence without the Redeemer's saving grace and forgiveness. He requires us to forgive others if we want to be forgiven.

So, let's be understanding and respectful toward our distant cousins. Let's incorporate in our hearts Christ-like love toward our distant cousins (even if they make blunders in our collaborative genealogical records). Send them emails kindly informing them of the documentary sources you have that lend greater light on the issue, so they can correct their erroneous contributions. Let's create everlasting friendships with our distant relatives.

Additional Resource: Chapter 4 of *A User's Guide To The New FamilySearch*.

CHAPTER 5: THE FUTURE--THE UNION OF NEW FAMILYSEARCH AND FAMILYSEARCH INDEXING

At times I hear complaints against New FamilySearch. My answer, invariably, is: Just wait. What we presently have in New FamilySearch is just Phase One. Granted, it has been a long time in coming and the additional features are being eked out at what seems like a snail's pace, but the wait will be well worth it.

Let's look at a few of the upcoming developments:

Family Tree

Family Tree is a new interface for New FamilySearch, presently under development. Family Tree is being written in Flash Technology, a faster computer language, written by Adobe Systems, which can handle a larger number of users and larger files, and it has great graphics capabilities. Family Tree also has some features the current interface for New FamilySearch does not have.

Several of the best portions, though not all, of Family Tree will replace much of the current interface for New FamilySearch (now called the Classic interface). The name will change from New FamilySearch to Family Tree at FamilySearch, or FamilySearch Family Tree.

Family Tree will still utilize the same New FamilySearch database, so all the information in New FamilySearch will be preserved.

Family Tree is located at www.Labs.FamilySearch.org. You can go there to see what Family Tree looks like.

Right now, you can read at Family Tree all the information contained in New FamilySearch, but you cannot edit or add information through Family Tree.

Family Tree will be brought over one piece at a time, about every three months. The first piece, the new Temple Ordinances screen, was brought over in August 2009. In December 2009, the pedigree chart of Family Tree is being brought over.

Public Access to New FamilySearch

“After new FamilySearch has been rolled out to all Church members, the system will be made available to the general public.”³⁴ We have not been told what features the general public will be able to access. We might surmise it will be similar to the FamilySearch website, where the general public can both read and contribute information, but would have no need for access to the temple ordinances section.

FamilySearch (the Family History Department) believes the general public can beneficially

³⁴FAQ, FamilySearch Developer Network for Software Programmers.

contribute significant amounts of data to our shared family tree.

FamilySearch has strongly embraced the “wiki” model—a community in which anyone can contribute information and which is self-policing. Its studies of current wiki websites show the model is very successful and does not exhibit the downside many of us fear.

However, FamilySearch has not yet figured out the “self-policing” mechanism. (Wikipedia.org, the principal model, has a judicial system.) Most L.D.S. family historians hope FamilySearch will develop a judicial system before granting “write” access more broadly.

New Source Standards

Currently, you can read, add, edit or delete Sources, which can be accessed from either the Summary or Details screen.

However, it’s largely a waste of time to enter your sources into New FamilySearch³⁵ at this time. The Sources section will be revamped.

In the future, greater attention will be paid to distinguishing among good/bad/no sources.

The Church is working with major archives to develop a standardized digital source format, so archives will be able to submit large amounts of information into New FamilySearch with an automated source attached.

To dedicated genealogists, this delay is a real bummer. Serious genealogists consider Sources to be essential to resolve conflicting views in family history.

The bad news is the wait. The good news is that this too will pass, and when it does, we will have an excellent Sources process.³⁶ Creating standards is immensely important; the accomplishment of this task will have greater benefits than we presently imagine.

So, please be patient until the new format for Sources has been completed. Don’t spend your time entering your sources for now. However, *keep a good record of your sources in your PAF file.*

³⁵Third-party software writers are currently not allowed to include Sources in the Synchronization process, due to the planned revamping of the Sources section.

³⁶Third-party software writers are watching this very carefully. They will almost certainly craft their Sources section to seamlessly harmonize with New FamilySearch’s ultimate standards.

Giving You More Control over the Data in Your Family Tree

The greatest aggravation to New FamilySearch patrons is the inability to correct erroneous data submitted by other contributors. FamilySearch is sensitive to the multitudinous feedback it has received on this issue. FamilySearch is debating ways to “empower the patron.”

The first step in this process is to encourage greater collaboration and communications among descendants. (Please encourage all patrons to make their email address available. Also, in Step 16, send friendly and substantive emails to contributors of incorrect data.) Most of our problems would be resolved by substantially-increased communications and collaboration.

Secondly, FamilySearch is considering some mechanism for “watchmen on the tower,” overseeing portions of their family tree. Before that would be possible, existing service opportunities need to be better filled. FamilySearch needs far more part-time service missionaries to serve in the Support Mission before a “watchmen” system could be developed. So, if you could serve 10-20 hours weekly and are reasonably computer savvy, please look into becoming a FamilySearch support missionary by calling 1-866-406-1830 or by e-mail to support@familysearch.org.

Thus, there is light at the end of the tunnel in respect to resolving erroneous data on New FamilySearch. But it requires more effort on our part before we can be empowered as “stewards of the data.”

Multi-media Capabilities

Many users have requested the ability to upload photos and audio and video streams into New FamilySearch. That is on the drawing board. Family Tree could take a year or longer to complete, so the multi-media capabilities have to wait their turn, but we are told they will come.

Attaching Documents to New FamilySearch Records

Many users have also requested the ability to attach documents to New FamilySearch records, just as they do on their home computers using PAF, Legacy, RootsMagic, and Ancestral Quest.

The Church has an even better plan: the union of New FamilySearch and FamilySearch Indexing.

To understand the immensely far-reaching implications of this plan, we need to divert for a moment to investigate FamilySearch Indexing.

FamilySearch Indexing—the Quiet Giant

In 1938, the Church initiated a greatly inspired (and expensive) program of microfilming records around the world—despite the fact we were in the middle of the Great Depression! The microfilming project moved the work of redeeming the dead forward by a huge bound. The number of names submitted for temple work, and consequently the number of temple ordinances performed, increased many fold.

Over the past 71 years, the Church accumulated approximately 6 billion records through both microfilming and, in more recent years, digital photography. Millions of those records were *extracted* over the past 35 years, supplying half the names we have used for temple ordinances during that period. But the vast majority remain on microfilm, untouched. The Church is rapidly converting all those microfilms to digital photographs, and digitally enhancing them in the process.³⁷ So, there will come a time when your eyes will no longer roll back in your head from reading microfilm! ☺

Additionally, the Church is shooting 800,000 new images per week. (An image may contain several records.)

The Church wants to index all those digital records so they will be easily accessible. If you haven't visited the Records Search pilot at www.FamilySearch.org, you really should.³⁸ If you ever researched microfilmed records, you will see the Records Search pilot is 100,000 times faster and *so* much easier on the eyes!

The big task is indexing all those records. For that purpose, the Church hopes hundreds of thousands of members will volunteer. The indexing program began 2 years ago. The Records Search pilot now contains 650 million names. About 1.7 million records are being indexed daily, at this time. The Church's target is to complete 3 billion names within 2 years. So the Church needs many, many more volunteers. Ideally, everyone between the ages of 13 to 80+ should be active Indexers.

So my appeal to one and to all is **Please become an Indexer!**

The Lord has granted us immense blessings with computers and the internet and other modern technology to assist us. The Brethren have declared that modern technology has been given by the Lord to mankind, through inspiration, for the very purposes of carrying out the Lord's work in

³⁷“The Family History Library (FHL) is in the process of digitizing its entire microfilm collection [of 2.4 million rolls of microfilmed vital records] using ScanStone, a hardware and software system developed by the LDS Church to rapidly create digital images of genealogical records contained on microfilm. When fully implemented, the FHL will be able to convert 370,000 rolls of microfilm per year into digital images. It is estimated that the digitizing project will be completed about 2012.

“An online index to the digitized records is also being created using FamilySearch Indexing software developed by the LDS Church. The church hopes to recruit hundreds of thousands of volunteers to complete the indexing project. Volunteers can participate by going to the Church's FamilySearch Indexing web site. Some of the databases containing the digital images and indices can be viewed at Record Search Pilot.” (“FamilySearch” article at www.wikipedia.org.)

³⁸At www.FamilySearch.org click on the *Search Records* tab, which will bring a drop-down menu, from which you can click on *Record Search pilot*.

these latter days.³⁹ And as President Eyring has pointed out, “Where much is given, much is required.” Thus, if we do not do our part, by utilizing the tools the Lord has given us to perform this work, then our negligence may place our salvation in jeopardy.

So, please, please become an Indexer! Together we can move this work forward at an astounding pace. It just takes everyone doing their part. No one will be asked to carry a heavy burden. Most Indexers only spend about an hour a week indexing, but in the aggregate we can index huge volumes of records if each member gives just a little of his time.

Please encourage all of your ward members, aged 13 and above, to become Indexers.

And even the 6 billion records in the vaults of Cottonwood Canyon are only a fraction of the world’s records of genealogical value. The Church estimates there are 70 billion records of genealogical value in the world, and that number increases by about 500 million annually (200 million birth records plus 300 million other records).

So, we will first index the 6 billion records we currently have copied, and then we will gain access to the rest of the records, and index them as well. It sounds like a huge job, but we are indexing 1.7 million records daily with only a tiny percentage of members participating. Think of what we could accomplish if every active Latter-day Saint gave just one hour a week to this great work!

As the records are indexed, they are added to the Records Search pilot.

Ultimately, when all the records are indexed, finding your ancestors will only take a few keystrokes. You will type in the name, an approximate birth year and a probable place of birth, and all the possible matches will come up in seconds, ranked by greatest probability of a match. In a few days, a person will be able to build a family tree that would have taken thousands of hours over a lifetime.

So let’s put our shoulder to the wheel!

The Union of New FamilySearch and FamilySearch Indexing

Now that we understand the immense capabilities which FamilySearch Indexing will bring, let’s see how it all fits together.

The goal is that in 2010, New FamilySearch and FamilySearch Indexing will become seamlessly united. You will be able to create cross-links between individuals in New FamilySearch and their records in FamilySearch Indexing.

For instance, let’s say one of your lineages ends with Robert Young born in Scotland sometime roughly around 1760. From his record in New FamilySearch, you will click a *Find Document* button, giving you a screen which will search the Indexed records. You will type in the

³⁹See, for example, the Brethren’s statements on pages 2-3.

information you know about him, even though that information is all just estimated. All the possible matches among all the records of genealogical value in the world will list out in a matter of seconds. You will peruse the records to see which might pertain to your Robert Young.

You will see that many of the records have already been cross-indexed with other individuals in New FamilySearch. That will help you, through the process of elimination, to find your Robert Young. When, after looking over all the records for the Robert Youngs born about that time in Scotland, you determine which record(s) pertain to your Robert Young, you will click a button cross-linking your Robert Young in New FamilySearch with the matching Indexed records.

And when you come back to his New FamilySearch record a week or a month or a year later, and you want to look at the original documents about him, all you will have to do is click a button in his New FamilySearch folder, and in seconds you will see all the original documents pertaining to him.

Now, that's fantastic, but what about the Family Bible in your possession that you want to attach to your ancestors' New FamilySearch records? Read on...

You will be able to scan documents into FamilySearch Indexing, and cross-link them to your ancestors in New FamilySearch.

The Church has already thought about you. You will go to your Family History Center and scan your original documents (such as Family Bibles) into the FamilySearch Indexing program. The program will accept the scanned image of your original document, and it will give you the opportunity to index that document.

Both the scanned image of the original document and the indexed transcription will now be in the FamilySearch Indexing database, from which you can create cross-links with your ancestors' records in New FamilySearch. And not only you benefit from that, but other New FamilySearch patrons, whose ancestors may be listed in the original documents you have in your possession, will be able to access both the Indexed transcription and also see the scanned image of your document.

Brothers and sisters, we are just beginning to see the possibilities. The Lord has much more in store for us. But we have to be diligent and do our part now, so He can bless us by revealing those additional tools He has in reserve to help us in this great work!

CHAPTER 6: SHOULD I STICK WITH PAF OR USE A THIRD-PARTY SOFTWARE PROGRAM?

The Church Will No Longer Update PAF

The Church will no longer update PAF (Personal Ancestral File). The Church's reasoning is that it has finite resources, which are not best allocated to supporting PAF. In particular, as family history becomes more common in nations around the world, it would require sizable resources to adjust PAF to the idiosyncracies of names and other genealogical data among a very diverse range of cultures and languages. Local members, in the various language areas, can best build genealogical computer programs designed to meet the unique needs of their region.

You can still download a free copy of PAF from www.FamilySearch.org, but the Church will no longer update PAF. An unsupported computer program will probably become obsolete. In particular, PAF will not be capable of communicating with New FamilySearch.

So, there may come a time when you will migrate from PAF to one of the third-party software programs. It may be now or it may be a few years from now. The more involved you are in family history research, the sooner you will probably want to cease using PAF and begin using a third-party software program.

Third-Party Software Programs Are A Generational Leap in Technology

The third-party software programs do not simply mimic PAF. They offer research aid. (They connect directly with online databases; they even give you research suggestions.) And they perform key functions with New FamilySearch.

There will be a major revision of the API (the protocol, or special communications language, between New FamilySearch and third-party software)⁴⁰ in January 2010. It will give the third-party software writers greater capabilities. Thus, we will see major revisions to the third-party software programs in early 2010.⁴¹

⁴⁰New FamilySearch maintains the highest level of security, to prevent the possibility of hackers cracking into the system. The API places very specific limitations on the manner in which third-party software can communicate with New Family Search, to avoid any possibility of a security breach.

⁴¹Those who already own an Affiliate's product will want to upgrade at that time. Fortunately, the Affiliates generally offer 12 months of free upgrades after you buy their program. You should check their website periodically for upgrades.

General Strategy for Software Use

1. *For now*, I suggest keeping your data in PAF until we see the software versions that will come out in January/February 2010.⁴² (If you have never used PAF or another home computer genealogy program, just work with New FamilySearch for now, and decide on a home computer program in early 2010.)
2. Start using the third-party software programs as PAF Add-In's as soon as you are ready to do Step 12 (Preparing for Synchronization) and Step 13 (Synchronization). You can purchase the software, or take advantage of the free trial offer, or use it at your local Family History Center.

I suggest you use Family Insight in Step 12 to Standardize the place names in your PAF file.

Use RootsMagic 4, Ancestral Quest, or Family Insight in Step 13 for Synchronization of your PAF file with New FamilySearch.⁴³ I used Ancestral Quest, because it is a certified PAF Add-In, it has the most comprehensive Synchronization process, and it uploads Notes⁴⁴ from PAF to New FamilySearch. But if you don't have Notes in your PAF file, and ease-of-use is your key criterion, you might use RootsMagic. (You could move your synchronized file back from RootsMagic to PAF via GEDCOM.)

3. For now, it is probably best to do all New FamilySearch features directly on the New FamilySearch website, and use the third-party software for those functions which the New FamilySearch website does not perform (Standardization and Synchronization).⁴⁵
4. When the software vendors release major updates to their programs in early 2010, you should re-evaluate the software programs, to consider moving your data from PAF into one of the third-party software programs. (We will provide a major review of the software programs at that time to assist you in making your decision.)

You need to understand that this is a major move; once you have moved your data from PAF to one of the third-party software programs, you need to park it there for several years. Each of the software programs offers slightly different bells and whistles. As a result, each has some unique fields. Once you have entered information into the unique fields, if you transfer your data to a

⁴²An additional benefit to this approach is to avoid overloading yourself. Most Church members still need to learn New FamilySearch and FamilySearch Indexing. Trying to learn one more computer program at the same time would be a bit much.

⁴³Legacy hopes to release its Synchronization function near the end of 2009.

⁴⁴Notes are limited to 300 characters at this time. This will increase to about 1,200 characters in January 2010. RootsMagic intends to begin uploading Notes at that time.

⁴⁵Before long, it will be more efficient and more effective to work on your New FamilySearch family tree through your third-party software. However, we are not quite there yet.

different software program, you will likely lose the data contained in those unique fields.⁴⁶ So, you need to choose your software program carefully.

There is no one best program. Each is a little different. One might be designed for ease of use, while another is designed for comprehensiveness of features. Which is best for you depends largely on your computer skills and your family history research objectives.

What Software Programs Are Available?

If you want to buy a third-party software program, you should pick one from among the FamilySearch Affiliates. A FamilySearch Affiliate is a company whose software has been certified by FamilySearch to communicate correctly with New FamilySearch. You can learn about the Affiliates' software programs by clicking on the link in the lower right-hand corner of the New FamilySearch sign-in page. (By the way, the Church receives **no** compensation of any kind from any of the Affiliates.)

The most commonly-used LDS-oriented genealogy software programs are (in random order):

Family Insight, from Ohana Software, is a PAF Add-In. (That means it is designed to work with a PAF file.) It has an excellent program for Standardizing your PAF place names in conformity to New FamilySearch's standardized place names (which you need to do in Step 12, as explained on page 33, as one of the essential preparations before Synchronizing your PAF file with New FamilySearch). It costs \$25 if you download it, or \$35 plus shipping for a CD at www.ohanasoftware.com.

Ancestral Quest, from Incline Software, can work as a PAF Add-In or as a stand-alone program. It has the most comprehensive Synchronization feature. It costs \$29.95 to download, or \$34.95 plus shipping for a CD at www.ancquest.com.

RootsMagic 4 is designed to work as a stand-alone program; it will easily import your PAF file. It has an easy-to-use Synchronization feature. It costs \$29.95 to download, or \$29.95 plus shipping for a CD at www.rootsmagic.com.

Legacy Family Tree, from Millennia Corp, is a stand-alone program; it too will easily import your PAF file. It expects to have its Synchronization feature available later this year. (We will update this chapter to evaluate it at that time.) It costs \$29.95 to download, or \$39.95 plus shipping for a CD and a user's guide at www.legacyfamilytree.com.

Each of these software programs offers a free trial. The terms of the free trials are different for each program.

⁴⁶In greatest likelihood, in the next few years, the software vendors will develop conversion routines that will preserve the data in their competitors' unique fields.

Software Awards

On 11 March 2009, the 2009 FamilySearch Software Awards were announced:

- Family Insight for “Best Standardizer”⁴⁷ and “Best Person Separator”⁴⁸
- RootsMagic 4 for “Easiest to Sync” and “Best Dashboard”⁴⁹
- Ancestral Quest for “Most Comprehensive Syncing”⁵⁰ and “Best Listing Tool”

Awards in other categories were announced for the following Affiliates:

- Generation Maps for the “Best Web Site Feature for Printing”
- Progeny Software’s Charting Companion for the “Best for Desktop Printing”
- US Family Tree’s Grow Branch for the “Best Web Site Feature for Publishing”
- TreeSeek for “Best Web Site Feature for Mapping”

Software awards will be announced again in March 2010. You might use the awards at that time as an aid in choosing software products and services. However, you should also remember that the awards only evaluate the programs’ New FamilySearch functions. Ancestral Quest, RootsMagic, and Legacy Family Tree should also be evaluated for their database management capabilities, research aid functions, and the manner in which they handle sources.

In early 2010, we will evaluate the software programs on the basis of all of these functions.

A couple of suggestions to the Affiliates in respect to Synchronization capabilities:

- 1) It would be great if the user had the option of designating a person or family as high priority, medium priority, or low priority for subsequent synchronization. Keeping track of the changes in your New FamilySearch family tree is a surprisingly large amount of work. As a result, some users un-link individuals who are not close relatives. Prioritizing your interest in subsequent synchronization would be a better alternative and would provide greater flexibility. (You might want to synchronize your high-priority ancestors every 6 months, your medium-priority ancestors annually, and low-priority ancestors every 2-3 years.)
- 2) It would also be great if the programs kept track of the records on one’s home computer which have changed since they were synchronized, for future uploading to New FamilySearch.

⁴⁷For Standardization of place names. (See Step 12, on page 33.)

⁴⁸For Separating out records which should not be in the person’s Combined Record. At this time, I would do this procedure solely in New FamilySearch, not thru third-party software.

⁴⁹The Dashboard maintains over-all control of working with New FamilySearch.

⁵⁰Ancestral Quest was awarded Most Comprehensive Synchronization, while RootsMagic 4 was awarded Easiest-to-Use Synchronization.

CHAPTER 7: WHICH INTERNET BROWSER IS BEST TO USE?

The most common web browsers are Internet Explorer (written by Microsoft), Firefox (written by Mozilla), and Safari (written by Apple Computer, but it performs well on both the Macintosh and the PC). There are also several other good browsers available.

Originally, the FamilySearch websites only supported Internet Explorer, but they now support Internet Explorer, Firefox, and Safari.

I personally recommend Firefox as your default browser for virtually all internet use for one major reason: About 95% of computer viruses, worms, and trojans are written to circumvent security weaknesses in Internet Explorer. Thus, you can very significantly reduce your chance of encountering a computer virus, worm or trojan by switching from Internet Explorer to Firefox.⁵¹ (You nevertheless should always maintain your anti-virus and other security software up-to-date.)

You can download Firefox for free at www.mozilla.com.

Free Automated Online Backup

There are several good online backup services. One of the best is at www.mozy.com. You receive a free account with 2 gigabytes of storage. That is more than sufficient for your genealogy files and other documents. However, if you have thousands of pictures, you will not be able to store them in 2 gigabytes. (Also, you don't back up software programs; they can only be restored with the original CD's.)

Be sure to set your settings after you create the account. Thereafter, your files will be backed up automatically, without you having to do anything. You will receive notification each time your files are backed up.

It's easy and it's secure. Everyone using the internet should have automatic backup. However, don't have Social Security Numbers or bank account numbers stored on your computer; with or without automatic backup, you are susceptible to hackers breaking into your computer.

⁵¹However, if you encounter a problem with any functions in New FamilySearch or FamilySearch Indexing while utilizing Firefox, you might switch to Internet Explorer to see if the function works properly on that browser. If so, send an email to FamilySearch Support (utilizing the *Send Feedback* link at the bottom of most New FamilySearch screens, or by sending an email to Support@FamilySearch.org) to let them know there is a problem with that function when using Firefox. (I have not encountered any such problems.)

CHAPTER 8: HOW TO INVOLVE OTHERS IN FAMILY HISTORY

Family History Consultants are always dismayed by the few number of ward members who become involved in family history. A few years ago the Church conducted a study and determined that only 4% - 5% of Church members had ever submitted a name to the temple.

Here's one simple way to involve a few more members in family history: At the end of their visit, Home Teachers and Visiting Teachers always ask if there is anything they can do to help you. Next time, say "yes" and ask them to index a few batches of records in the FamilySearch Indexing program. Offer to show them how to do so.

CHAPTER 9: A PERFECT, INEXPENSIVE CHRISTMAS GIFT

Most genealogists do ancestral research; for the past couple of years I have concentrated primarily on descendency research, because there are a dozen other researchers working on each of my ancestral lines.

So, two years ago, I decided to research the descendants of my great grandparents. I started by looking up my great grandparents in the censuses, and also their children and grandchildren. The most recent U.S. Federal Census available for public use is the 1930 census, which lists my parent's generation (as children).

I then delved into a number of other documentary databases, primarily at online depositories, such as Ancestry.com. New FamilySearch is also a great aid in descendency research.

Next, I called all my cousins and asked them if they knew the names and phone numbers of some of our second cousins. I called these and obtained the names of more and more second cousins. Before long, through this family network, I had located virtually every descendant of my great grandparents. They were also very helpful in helping me fill in the holes in my documentary research on their respective branch of the family tree.

Finally, I prepared four family directories, one for each set of great grandparents. PAF, RootsMagic, Legacy Family Tree, and Ancestral Quest all have a feature that will take your database and convert the data into a book-like format. So, I selected the descendants of a set of great grandparents, and transferred the data into a word processing document. I added a few comments and deleted a few things, and in a short time, I had family directories for each of the four lineages.

The family directory provides the standard genealogical data for each descendant of that set of great grandparents. Additionally, for living descendants, it lists the phone number, address, and email address, so we can all keep in contact with each other.

I printed off a copy for each living descendant and sent them out as Christmas presents. It cost me two or three dollars per relative. The response I received was amazing! Everyone was so happy with their family directory! I even bumped into a couple of relatives interesting in ancestral research, so we are now collaborating.

After the fact, I realized that was quite a nice member-missionary project (although I had not originally intended it as such). I am the only one in my extended family who is LDS, but they all know I am. The family directory created a lot of goodwill toward the Church.

For individuals whose relatives are LDS, it might prove to be an excellent re-activation tool for those relatives who are less-active.

The Spirit of Elijah is a very strong influence....You might want to extend that Spirit to your relatives too.

APPENDIX A: TEACHING NEW FAMILYSEARCH IN YOUR WARD

Bishop's Support for Your New FamilySearch Class

It would be ideal if your Bishop would encourage your ward members to take a New FamilySearch class if they plan to work in New FamilySearch. When members go onto New FamilySearch without proper training, they tend to combine records that should not be combined and commit other errors damaging to the common family tree, as well as perform improper temple ordinances.

Ways To Make Your Job Easier

Family History Consultants have a big job teaching New FamilySearch to all members of the ward. You will make your job easier if you:

- 1) Encourage husband and wife to take the class together, if possible, so they can help each other.
- 2) Encourage everyone to utilize the online training available at the New FamilySearch website. Members who are not computer-savvy should be encouraged to review the overviews two or three times. You can also download the e-Learning course to a flashdrive to pass to others.
- 3) Encourage all students to complete the assignments before the next class. If they fall behind, they will likely fall behind further and further.
- 4) Encourage families to work on New FamilySearch together. Often, teenagers may be able to help their parents when the parents are confused about computer functions. This will be an enriching experience for all family members.
- 5) Encourage home teachers and visiting teachers to work with their assigned families (especially less-active families) on their New FamilySearch family tree during their visits.
- 6) Encourage ward members to be patient with themselves in learning the computer program.
- 7) Encourage ward members to be loving toward their distant cousins whose contributions to New FamilySearch may be inaccurate.

Developing a Lesson Plan for a New FamilySearch Sunday School Class

Chapter 3 lists the proper order of working on New FamilySearch; Chapter 4 provides the details for each step listed in Chapter 3. Following is a suggested order for presenting this material:

Class 1: Introduction, Chapters 1 - 3, and Steps 1 - 4.

Classes 2 and 3: Step 5 (Combining Records).

Class 4: Steps 6 and 7.

Class 5: Steps 8 and 9.

Class 6: Step 10.

Class 7: Step 11, and Chapters 5 and 6.

After teaching Class 7, you may want to wait a few weeks or even a couple of months before teaching the next class (Preparations for Synchronization), as class members will not be ready for synchronization until they have finished combining all records and other clean-up tasks in their New FamilySearch family tree.

During the interim, in my ward, I insert four weeks of FamilySearch Indexing training, to encourage the class members to become Indexers. Meanwhile, they also have time to continue preparing for Synchronization.

Class 8: Step 12 (Preparations for Synchronization).

Class 9: Step 13 (Synchronization).

It would be ideal for the teacher to assist the student with Synchronization on a one-on-one basis, perhaps at the student's home, when the student first sits down to synchronize. I demonstrate Synchronization in class and then go to their homes to help them get the process going. (Synchronization takes many hours if you have a large family tree.)

Class 10: Steps 14 - 16. Briefly touch on Appendix E.

Labs should be scheduled throughout the course, particularly after Step 5 (Combining Records) and Steps 12 and 13 (Synchronization).

How To Present The Class

An ideal way to present the class is by projecting New FamilySearch from a laptop onto a large screen. This way, you can show the class members what you are talking about. To do this, you need a laptop, a projector, a screen or white wall, and an internet connection. However, LDS meetinghouses generally don't have internet access. So, ask around in your ward to see if anyone has a cell phone internet account. (This allows you to access the internet via satellite from any location.) Hopefully, someone will have an unlimited-usage internet cell phone account.

Assuming you are able to obtain a projector and an internet connection, it is good to invite class members to work on their New FamilySearch family tree in class to demonstrate the functions you are discussing. (Class members generally find this real-time experience exciting.) For example, when you are talking about Registration, register a member in class, so everyone can see the process step-by-step. When you are combining records, combine records several times so the class members get a feel for not only the computer process but also the decision-making process.

If possible, include a few "labs" at your local Family History Center, if it is nearby, as part of the class. It would be ideal to teach a class at your meetinghouse one Sunday and then follow it with a practice lab at the Family History Center the following Sunday, and alternate in that manner throughout the course.

Alternatively, you might encourage ward members to go to the Family History Center for individual attention, when they can.

In the end, though, you will need to go to the homes of ward members and help them individually.

Teaching New FamilySearch in a Seminar

If you have highly-motivated students, you might use the following lesson plan, perhaps on Sunday evenings at your local Family History Center, if it is nearby:

- a) Before the first class, the students should read pages 2 - 21 of this manual and review the overviews listed in the assignments for Steps 1 - 5.
- b) The first class should cover through Step 5 (Combining Records). The class would probably last about 2 - 3 hours plus an hour of lab time. Each student should have access to an internet-connected computer, so the student can practice what he learns in each step before you move on to teach the next step. For example, after learning Step 1, he should register, while you are watching and able to help with any problems. Then you teach Step 2.

Combining records is generally the most difficult task on New FamilySearch, so you should practice combining records several times as a group, before the students attempt to combine records on their own.

- c) The second class should be held a week later. During the interim, the students should read pages 22 - 25 and review the overviews listed in the assignments for Steps 6 - 7. The students could also combine the records for their first few families.

It would probably be a good idea to review the process of Combining Records again, to make sure everyone is fully comfortable with the process. Then cover Steps 6 - 8.

Again, after teaching a Step, allow the students to practice it on their own family tree before you teach the next Step. This class with probably last about 2.5 hours plus a couple of hours for lab time.

The students should bring a copy of their PAF records to this and all subsequent classes, for reference while working on New FamilySearch.

- d) The third class should be held a week later. During the interim, the students should read pages 26 - 33 and 43 - 48 and review the overviews listed in the assignments for Steps 9 - 11. This class would last about 1.5 hours plus an hour for lab time.
- e) The fourth class should probably not be held for about 2 months, because this class deals with Synchronization. The class members will not be prepared for Synchronization until they have finished Steps 1 - 11 on their entire family tree (or, more exactly, the portion of their New FamilySearch family tree that corresponds to their personal research and is therefore the portion of the family tree which they will clean up).

The fourth class would cover Step 12 (Preparations for Synchronization). They should have read pages 34 - 36 before coming to the class. The fourth class would last upwards of 2 hours. They

should bring their PAF file on a flash drive to class. During the class, the students should Standardize the place names in their PAF file, using Family Insight.

Between the fourth and fifth classes, the students should finish the preparations for Synchronization and read pages 36 - 39 and Chapter 6.

f) The fifth class should be held a week after the fourth class. During this class, you will teach them how to Synchronize their PAF file with New FamilySearch, and the students should Synchronize several records during class, so they should bring their PAF file on a flash drive to class. The class will likely last about 2 hours.

g) The sixth class would be held a couple of weeks later (or enough time for them to finish Synchronization, which potentially could take a few weeks, depending on the amount of time they have and the size of their family tree). Before the sixth class, the students should read pages 39 - 42. You will teach them Steps 14 - 16 and complete the course. This class will last about 1 hour.

Help Registering

If you have students who might have trouble registering, you might give them one-on-one help or give them a copy of *Getting Started Using The New FamilySearch* (a guide located under *Learn How To Use FamilySearch* on the homepage), which gives excellent instructions on registering.

A User's Guide To The New FamilySearch

You should take *A User's Guide To The New FamilySearch* to each class and lay it on the table in a location and manner inviting class members to peruse it.

Distribute Policies for Preparing Names for Temple Work and Appendices A, B and C of A User's Guide To The New FamilySearch

All serious users of New FamilySearch should read and have a copy of Appendices A, B and C of *A User's Guide To The New FamilySearch*. These appendices give the conventions for entering names, dates, and places.

Distribute *Policies for Preparing Names for Temple Work* (located under *Learn How To Use FamilySearch* on the homepage), which gives the Church policies for submitting names for temple ordinances.

Loving Collaboration

Throughout the course, please repeatedly teach your ward members to treat their distant cousins with respect and Christ-like love. We can fulfill our responsibility to help save the dead only through successful collaboration.

APPENDIX B: IF YOU ARE A PRIESTHOOD LEADER OR FAMILY HISTORY CONSULTANT, PLEASE REGISTER WITH THE FAMILY HISTORY DEPARTMENT

All priesthood leaders and all Family History Consultants are invited to register with the Family History Department. This will enable the Family History Department to send you emails to inform you of major developments in the Church's family history program.

Registration also grants you early access to New FamilySearch and to the online New FamilySearch training, if your temple district is not yet on New FamilySearch.

To register, go to www.Priesthood.FamilySearch.org. You will need your membership number (which is on your temple recommend and also on your Individual Ordinance Summary) and your ward unit number (which is on your Individual Ordinance Summary).

APPENDIX C: BISHOP, HOW TO ORGANIZE A GREAT FAMILY HISTORY PROGRAM, WHICH WILL RAISE THE SPIRITUAL LEVEL OF YOUR WARD

Bishop, there's a simple but very powerful formula for organizing a great family history program in your ward. A successful family history program won't siphon off resources from other ward programs—it will raise the spiritual level of your ward, which will raise the level of human resources in your ward. So, you really can't afford not to follow the formula.

Here it is:

1. Make sure all your priesthood leaders (including yourself) and all your Family History Consultants are registered with the Family History Department at www.Consultant.FamilySearch.org.

The Family History Department wants to be able to send emails occasionally to all priesthood leaders and all Family History Consultants, to keep you all abreast of major developments in the Church's family history program. (To register, you need both your membership number and your Ward Unit Number.)

2. Make sure your High Priests Group Leader understands his responsibilities in respect to family history.

The High Priests Group Leader is assigned to oversee family history and the ward's Family History Consultants. He needs to meet with them periodically and report to you in the PEC meeting regarding the family history program in the ward.

3. Organize an effective team of Family History Consultants.

- 1) At least one Family History Consultant should be a good family history researcher.
- 2) One Family History Consultant should be a "computer geek." He/she may know little about family history, but he can make a major contribution to the teaching of family history by helping ward members understand how to use the computer. No area of Church activity utilizes computers more extensively than family history.
- 3) One Family History Consultant should be a good teacher. He/she may know little about family history, but you will probably hold New FamilySearch classes, Indexing classes, and basic family history classes non-stop for at least a year. Thus, you need a strong teacher. If the teacher cannot answer some questions, the Consultant who is a strong family history researcher could field the research questions, and the "computer geek" could field computer questions.
- 4) Many wards call a Family History Consultant as Ward Indexing Director. This could be especially beneficial at this time, as your ward will need to provide instruction and encouragement in both New FamilySearch and FamilySearch Indexing.

5) With the heavy training requirements of New FamilySearch, you might want to appoint one Family History Consultant to become a guru in New FamilySearch. (The presence of a guru in the ward creates energy and vibrancy that spills over into all the ward's programs.)

6) If you are able to have still more Family History Consultants, you might appoint one to become a guru in PAF (Personal Ancestral File) and similar home computer programs. The "computer geek" could probably serve in either capacity # 5 or # 6.

4. You need to set the example, Bishop.

That's not what you wanted to hear, but it's the truth. The Savior led by example; you must do likewise. You can't ask your ward members to work on New FamilySearch and FamilySearch Indexing if you aren't. You have a conscience, and your conscience won't allow you to ask others to do things you aren't doing yourself. You can't say: "Do as I say; don't do as I do." You have too much integrity for that.

Now, your natural reaction is that you are too busy. Bishop, you're too busy not to do it. You want to raise your ward's spirituality, and you want your ward members to enjoy the Lord's blessings. The Lord has given us a major responsibility to identify and help redeem the dead; the Lord can't bless your ward, Bishop, if your ward members are not doing what He has asked them to do. The Church conducted a study a few years ago and determined that only 4% or 5% of the Church membership had ever submitted a name to the temple. Can the Lord bless the other 95% of your ward members as He would like to? I don't think so.

So, you need to take a little time—it doesn't have to be a huge amount of time, perhaps just an hour a month, or more if you can—to set an example both for your own family⁵² and for your ward family. That will turn out to be one of the most productive hours of your month, because it will leverage a huge amount of family history work by your entire ward. And then the Lord can bless them to a greater degree, and the spiritual level of your ward will rise.

It's like investing a buck and earning \$5 interest weekly. You just can't afford not to do it.

You have to lead by example, Bishop. You can do it, and your ward will follow you. They love you, and when you share with them the spiritual blessings you experience by doing this great work, they will say, "If the Bishop, who is so much busier than I, can do it, then certainly I can." And they will, Bishop.

5. Challenge your PEC members to be good examples also.

The power of example cannot be over-stressed. When you set the example and your ward leaders likewise set a good example, it becomes contagious.

⁵²You might set aside one Family Home Evening each month to working on New FamilySearch and/or FamilySearch Indexing if your family members are old enough to participate. You kill several birds with one stone this way.

6. Set family history goals for your ward.

You need to challenge your members. Nothing is ever accomplished without a goal and a plan. So, in sacrament meeting, you need to present your family history goals to the ward membership.

What are some family history goals you might set for your ward?

a. *Hold a Family Home Evening about your family history.* There's nothing more fun in the world than sharing pictures of grandparents and aunts and uncles, etc. Share stories about the lives of your ancestors. Pull out your Book of Remembrance and share it with all the family. It's an easy Family Home Evening to prepare. And the whole family will love it! Let the Spirit of Elijah into your home, the fun and easy way.

Other fun Family Home Evenings can be to Index together as a family, and to work on the family's New FamilySearch family tree together.

Ward, quorum and Relief Society leaders should periodically encourage members to hold Family Home Evenings about their family history.

b. *New FamilySearch:* Each adult member of the ward should attend a course in New FamilySearch. (New FamilySearch is a powerful, versatile computer program. As a result, it requires some training in order to understand how to use it properly. When untrained members use New FamilySearch, they often make mistakes which adversely affect not only them, but all other members of the shared family tree. They also perform a lot of invalid temple ordinances.) Adult ward members who do not have callings during the Sunday School hour might attend a New FamilySearch course during Sunday School. Members who have callings during the Sunday School hour might attend a New FamilySearch class taught at their local Family History Center.

Adult members should become trained in New FamilySearch and thereupon clean up their New FamilySearch family tree.

Next comes the happiest part: Each family can then determine whether there are ancestral family members listed in New FamilySearch who need temple ordinances (after all records have been properly combined). If so, *the family should personally take those names to the temple.* A Church study indicated 95% of members had never submitted a name to the temple. Doing so and performing the ordinances for a family member can be incredibly inspiring.

New FamilySearch can be a catalyst to help members prepare for a temple recommend. In fact, Bishop, you might select a few families you want to encourage to work toward temple worthiness to attend the New FamilySearch class or a basic family history class. It might rev them up.

c. *FamilySearch Indexing:* Ideally, all Church members, aged 13 or above, should become active Indexers. In the least, every member of the ward should give FamilySearch Indexing a try. It would be wise for ward members to participate in a short Indexing class during the Sunday School hour prior to serving as an Indexer. Members unable to attend an Indexing class during Sunday School might attend an Indexing class offered at their local Family History Center. (Indexing can

also be learned on a self-study basis, but a class is ideal.)

d. *Involve Young Men and Young Women in FamilySearch Indexing:* The Church especially encourages all Young Men and all Young Women to become active Indexers. The May 2009 *New Era* article entitled “Indexing Mania” (on pages 18-21) relates the success of the Payson Utah 20th Ward's YM/YW involvement in Indexing. (The Bishop challenged each YM and YW to index 1,000 names in order to qualify to go on a special YM/YW trip.) Many wards take small groups of youth to their local Family History Center for training in Indexing. Parents should be reminded to encourage and assist their YM/YW in indexing. (Obviously, it would be best for the parents to be active Indexers.)

e. *Home teachers and visiting teachers should encourage their families in family history.* Home Teachers and Visiting Teachers are responsible to encourage and assist their families to benefit from the full Church program, including family history. Thus, Home Teachers and Visiting Teachers should ask their families if they are using New FamilySearch and if they are Indexing. Home Teachers and Visiting Teachers might give demonstrations of New FamilySearch and FamilySearch Indexing to their families, especially to less-active members, who might get interested and return to activity through involvement in these inspired programs, as they are touched by the Spirit of Elijah.

Training The Ward In New FamilySearch And FamilySearch Indexing

In order to properly train your ward members in New FamilySearch and in FamilySearch Indexing, you should probably plan on holding New FamilySearch courses and FamilySearch Indexing courses during the Sunday School hour, on a rotational basis, for at least the next year.

Chapters 3 and 4 of this manual are designed to serve as either an individual study guide or as a teacher's lesson manual for New FamilySearch. Appendix A gives the teacher suggestions of how to present this material.

An ideal way to teach these courses is to hold instructional classes at the ward meetinghouse during the Sunday School hour, supplemented by practical labs on the computers at your local Family History Center, if it is close-by.

During the instructional classes, it would be ideal to project New FamilySearch or FamilySearch Indexing on a large screen from a laptop. To do so, one needs a screen (or white wall), a projector, a laptop, and an internet connection. Meetinghouses generally do not have internet connection. You might ask around to see if a ward member has an unlimited internet account in conjunction with his cell phone account.

Family History Consultants also need to avail themselves to go to members' homes to assist them with questions/problems related to New FamilySearch, FamilySearch Indexing, or any other family history matters.

APPENDIX D: FUTURE UPDATES TO THIS MATERIAL

This manual will be updated whenever there are significant changes to New FamilySearch or to the third-party software programs. The manual has just been updated to reflect the December 2009 changes to New FamilySearch.

The next update will likely be in March 2010, as New FamilySearch hopes to bring some functions over from Family Tree to New FamilySearch about every three months.

By then, Legacy should come out with its Synchronization function (to rival Ancestral Quest, RootsMagic and Family Insight).

In early 2010, the third-party software companies will make major changes to their programs, as the result of a major change in New FamilySearch's interface with third-party vendors (called the API). Thus, this manual will be updated at that time to report the added features the third-party software companies will be able to offer.

APPENDIX E: RESOLVING MAJOR PROBLEMS IN NEW FAMILYSEARCH

Wrong Gender

1. *If temple ordinances were performed for an individual under the wrong gender:* Send an email to <https://contact.familysearch.org> giving the decedent's name and Person Identifier and explain that temple ordinances were performed for the individual under the wrong gender. Give your relationship and the source of your information concerning the individual's gender. FamilySearch Support can remove the record from view in New FamilySearch.

If a record does not exist with the correct gender for the individual, create one and do the ordinances.⁵³

2. *If temple ordinances were NOT performed for the individual, and his/her gender is listed incorrectly:* FamilySearch Support will NOT remove the record.

FamilySearch recommends you dispute the gender. The problem with that is there are "pedigree surfers" (see pages 28-29) who surf the pedigree chart looking for names that say "Ready" without reading the individuals' records.

As a result, some patrons reserve the name with the wrong gender to prevent others from doing erroneous temple ordinances.

My recommendation is:

- a. Dispute the gender, giving your source of information. This provides an explanation to other descendants.
- b. Go to the Details screen, click *Edit* by the individual's name, click *Add Another Opinion*, then enter the individual's name followed by WRONG GENDER. Example: Mary Smith WRONG GENDER. When you are prompted to identify the name parts, identify WRONG and GENDER as *Other*.
- c. Then go to the Summary screen and select the name you have just entered (i.e., Mary Smith WRONG GENDER). This will be the name that will appear in New FamilySearch's various screens, including the screen from which names are reserved for temple ordinances. This should prevent others from reserving the name, if they are reasonably observant. (And if it gets to the temple, the temple workers are likely to ask the patron about the WRONG GENDER designation.)
- d. If you are still concerned that someone could reserve the name for temple ordinances, reserve it yourself. (Be aware that the WRONG GENDER designation probably won't show up on the *Individuals I've Submitted For Temple Ordinances* screen, for lack of space in the surname field.)

⁵³A User's Guide to the New FamilySearch, pages 178-179.

If you reserve the name, you might want to do the following: Click on *Add Information* at the bottom of the individual's Details screen. Click *Other* and *Continue*. In the screen which will appear, type WHY I RESERVED THIS NAME in the *Title* field; type TO PREVENT OTHERS FROM PERFORMING ERRONEOUS ORDINANCES in the *Description* field. Click *Done*. (That will save other patrons from emailing you to advise you not to perform ordinances with that record.)

Incorrect Sealings

Send an email to <https://contact.familysearch.org> if a person was sealed to the wrong spouse or parents. Include the names and Person Identifiers, and a thorough explanation, preferably with sources. The Data Quality Team can remove records with erroneous sealings from view in New FamilySearch. If the correct sealings have not been performed, you can do them.⁵⁴

Please note the following Church policy: "Temple sealings that were performed PRIOR to 1 July 1969 with an incorrect mother's name can be redone with the correct mother's name. Sealings of children to parents performed AFTER 1 July 1969 are valid even if a wrong mother's name is given. The word "mother" used in the temple ordinance takes precedence over any name that is given."

Incorrect Relationships

1. If, by an erroneous linking in New FamilySearch,⁵⁵ you created an incorrect relationship (i.e., you listed someone's mother as his wife), you can undo that relationship.

If it is a child-parent relationship, go into either the Spouses And Children screen or the Parents And Siblings screen (whichever shows the incorrect relationship), click *View relationship details* at the bottom of the screen, then click *Edit* next to the incorrect relationship, then click *Delete* and *Done*.⁵⁶

If it is a husband-wife relationship, go into the Spouses And Children screen or the Parents And Siblings screen (whichever shows the incorrect marital relationship), make sure the incorrect pair are listed in the husband and wife positions, then click on the option button in front of either the husband's or wife's name. From the drop-down menu, select *Delete or Dispute relationship to*

⁵⁴A *User's Guide to the New FamilySearch*, page 179.

⁵⁵You can use this function only if 1) you were the sole Contributor of this relationship, and 2) you created this relationship *within* New FamilySearch (not in Ancestral File, Pedigree Resource File, IGI, or the Four Generations Program).

⁵⁶If you need to delete a relationship between a person and his incorrectly-listed parents, remember that you need to delete two relationships: 1) the relationship between the individual and his incorrectly-listed father, and 2) the relationship between the individual and his incorrectly-listed mother.

spouse. Then click *Delete*; then click *Done*.

2. If you did not create the erroneous relationship:

a) If it is a child-parent relationship, click *View relationship details* at the bottom of the Spouses And Children screen (or Parents And Siblings screen), then click *Edit* next to the incorrect relationship to see who the Contributor was. If the Contributor's email address is listed, send the Contributor a polite email explaining the situation. Remember to include the Person Identifier. Give him your information and sources. Ask the Contributor to delete the erroneous relationship, if he agrees with you. You may want to cut and paste this section into the email, as few Contributors know how to do this.

b) If it is an incorrect marital relationship, you can determine the Contributor by going to the Summary or Details screen, and click *Combined records* at the bottom of the screen. Look for the record(s) with the incorrect Spouse listed. Look at the top of the record to see who the Contributor(s) were. Send them an email, with the data described in the fore-going paragraph.

3. If the Contributor has *not* provided an email address or other contact data, you might want to dispute the relationship. (See pages 39 - 41, which explains Disputes.)

You might also want to do the following to isolate and label the erroneous relationship:

a) Separate from the Combined Record the record(s) which contain the incorrect relationship and whose Contributor has no email address. (Step 6, on page 21, explains how to separate a record from the Combined Record.) Identify the record(s) to be separated by looking for the record(s) which indicate the incorrect spouse. (If the erroneous relationship is a child-parent relationship, it is more difficult to discover the individual record causing the problem.)

b) When you have separated the record, click the *View this record on the family tree* link. Review the record to make sure it contains the erroneous relationship.

a) Go to the record's Details screen. Click *Edit* next to the name. Click *Add Another Opinion*. Type the individual's name followed by WRONG PARENTS or WRONG SPOUSE. Example: Jane Doe WRONG PARENTS. When you are prompted to identify the name parts, choose *Other* for WRONG and PARENTS (or SPOUSE).

b) Go to the Summary screen and select the name you just created (i.e., Jane Doe WRONG PARENTS). This will be the name that appears for this record on New FamilySearch's screens.

c) Go back to the Details screen, go to the bottom of the screen, and Click *Add information*. Click *Other* in the bottom right-hand corner. Then click *Continue*. In the *Title* field, type DO NOT COMBINE. In the *Description* field, type WRONG PARENTS or WRONG SPOUSE. You might also indicate in the *Description* field who the correct parents or the correct spouse was.

d) Please be aware this potentially creates the possibility that duplicate ordinances could be performed, since the record you separate from the Combined Record may say "Ready" for temple

ordinances. You may need to reserve the record yourself to prevent others from performing duplicate ordinances—and you must make sure you do not perform ordinances with this record! Please be aware the WRONG SPOUSE or WRONG PARENTS designation in the name field will probably not show up on the *Individuals I've Submitted For Temple Ordinances* screen, for lack of space in the surname field.

Please use this procedure **only** if the Contributor lacks an email address; otherwise try to work with him.

When, Where, And How To Place a “Do Not Combine With” Notice

Sometimes you separate out a record of a person with a similar name (often a son or cousin), only to find the record has been re-combined into your ancestor’s Combined Record by another, well-meaning patron. To prevent this from re-occurring, after re-separating the records, it is best to add a “Do Not Combine With” notice in *both* records.

Please do *not* place the “Do Not Combine” notice in a person’s name field. When patrons have done this in the past, serious problems have arisen.

Instead, go to the bottom of the Details screen, click *Add information*, then click the *Other* box, and *Continue*. In the *Title* field, type “DO NOT COMBINE WITH THE FOLLOWING”. In the *Description* field, provide the name of the person who is not to be combined into this Combined Record, along with enough other info (birth data, etc.) to clearly identify the person. (Do not list the Person Identifier, as the Person Identifier can change.) This will place the “Do Not Combine With” notice at the bottom of the Details screen. It will also show up in the Compare Possible Duplicates screen, which should prevent any reasonably alert person from combining the two records.

Tip: This same procedure can be followed to make patrons aware of other important matters.

Source: Document 107805.

Records Which Create Major Problems

The New FamilySearch Help Center contains Documents to address some ugly problems:

Loops (a person is identified as himself and as his father or grandfather, causing the pedigree to loop endlessly): See Document 101213. (Type 101213 in the Help Center’s Search field.)

Hijacked records (the names of 2 people are in one individual record): See Document 106612. This document assumes you can locate the Contributor who messed up the record, and that he will correct the problem, which is only likely in a small percentage of cases. Otherwise, go to Document 107020.

Records that create major problems in your pedigree: See Document 107020. This document says to send a feedback email to FamilySearch Support for a Loop you could not resolve following Document 101213's instructions, a quarantined record, or to "make a record less obvious that is causing problems with my pedigree".

Do Not Quarantine Records

Until recently, FamilySearch instructed patrons to quarantine records which constitute Loops or Hijacked Records. But FamilySearch has reversed its policy on quarantining records, due to misuse by patrons. We are instructed to no longer quarantine records, per Document 107020. (To see this document, go to the Help Center and type 107020 in the Search field.)

Now, if you encounter a record entitled Quarantined Record, you should send a feedback email to FamilySearch Support. In the email, provide the person's name and PID (Person Identifier). FamilySearch Support will attempt to remove the words Quarantined Record from the name, and will try to help you resolve the problem which this record creates.

Total Mixup of Family Members

One of my lineages was totally convoluted for 3 or 4 generations. There were Williams, Timothys, Joels and Johns in each generation. Each Combined Record contained Williams, Timothys, Joels and Johns. Some individual records showed a man married to his mother, others to his daughters-in-law. One person had 3,596 records (all convoluted); the others had 1,000 - 2,000 records each. Every person had 3 - 4 fathers and 3 - 4 mothers (not 3 - 4 pairs, but mixed together, giving a dozen pairs of parents per person). Each person had 7 - 8 spouses.

My first reaction was to throw up my hands and give up! But this is what I did:

- 1) I began by contacting other descendants who had thoroughly researched this lineage, to come to agreement as to who married whom, and who was the child of whom. It is always best to determine what the correct information is before trying to clean up a mess.
- 2) I separated all the Timothys and Johns and Joels out of William's record, and vice versa.

But even so, the Combined Record for William-born-in-1641 contained records of William-born-in-1679 and William-born-in-1724, and each of them had each other's wives and children and parents and birth data and death data.

So, I had to make a strategic decision—**family relationships trump birth and death data**. This realization is absolutely crucial. If you get the relationships right, the dates and places can be corrected later; but if you use the dates and places as your principal guide, you will link everyone incorrectly, and it will be virtually impossible to correct.

- 3) So, next I took one person at a time and created one Combined Record for each set of

relationships (right or wrong): First, I paired each marital team. Then within each marital team, I divided the records according to the father; then I further broke it down according to the mother. That created about 50 Combined Records for each person (with an average of about 30 records in each Combined Record). Only one Combined Record for each person was correct, but I needed to segregate the relationships so each Combined Record would have homogenous relationships within it (though not necessarily homogeneous birth dates).

The correct Combined Record for each person now serves as our family tree, although some of the multitudinous dates and places in each Combined Record still need to be corrected. (See # 6 below.)

- 4) I quarantined all the records which created perpetual loops or were hijacked records (2 people in one individual record). (See how to quarantine these types of records on pages 69 - 70.)
- 5) There were a few small erroneous Combined Records which had no Contributor with an email address, so I used the procedure described on page 67 (# 3) to isolate those records.
- 6) Next, I will contact other Contributors to ask them to review and correct their data. It would be good if many would delete their erroneous or duplicate records, to reduce the size of the IOUS.