

Getting Started

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FamilyInsight offers several new features and improvements over PAF Insight.

Full Synchronization: Synchronize Your File with the new FamilySearch™ website

- Search the new **FamilySearch™** website for people in your file to avoid duplication
- Easily combine records on the new **FamilySearch™** website and synchronize them with your records
- Add new information or individuals from your file onto the new **FamilySearch™** website.
- Add information or people you choose from the new **FamilySearch™** website to your file.
- Separate (uncombine) records that were improperly combined on the new **FamilySearch™** website.

Simple Update

- Works with the new **FamilySearch™** website but in a simplified manner. Similar to the Search IGI Mode
- Updates without combining or Synchronizing records on the new **FamilySearch™** website
- Add information or people you choose from the new **FamilySearch™** website to your file.

New Features

- Suggestions for place names in the Edit Places mode and elsewhere within the program
 - Use these to fill in missing counties, correct spelling errors, and standardize places according to the new **FamilySearch™** website
- Reads and writes to multiple file types
 - Open a GEDCOM, Family Tree Maker 2010 or 2011, Ancestral Quest or PAF 5 file directly into FamilyInsight without importing it into PAF first. Soon you will also be able to use a RootsMagic, Legacy or Family Tree Maker for Mac file.
 - Reads, writes to and saves directly to the file loaded
 - Clean up files from the Internet or other researchers
 - Compare your file to another file in Compare and Sync
 - Use a file from other commercial programs without loss of data
- **Guide Me** button – Step-by-step instructions for each mode
- Enter new people and details without returning to PAF
- Enter source citation details without returning to PAF
- Select the font style and size of your choice

Changes

To accommodate some of the features on the new **FamilySearch™** website, the **Details** window has changed. First, you only see event fields that have data. If you do not have any death information for the person, you will not see a section marked Death. You can add this information by either clicking the **New** button in the **Details** window and selecting **Event / Attribute**, or by selecting **Add Event / Attribute** from the **Edit** menu of FamilyInsight.

Second, there are icons for viewing information that you receive from the new **FamilySearch™** website or that appear in files from other genealogy programs. One example is the notes icon for notes that are attached to a specific event or attribute much like a source for each event/attribute. You may add notes to each individual event but you will not see them when you return to PAF because PAF does not have that feature. You will see them when you reopen your file in FamilyInsight. Additions you make to your file from another program will be visible when you import the file into a program with these features.

Opening from PAF

You can open FamilyInsight from the Tools menu of PAF or from your desktop icon. To open FamilyInsight from PAF 5, click on the **Tools** menu and select **FamilyInsight** by clicking once. You will see a message stating, "Please wait while the program loads". FamilyInsight opens to an options menu asking, **How do you want to start?** Select the mode (function) by clicking once on the appropriate button. Your choices are:

- Edit RINs and Pedigrees
- Merge
- Edit Places
- Search IGI
- Simple Update
- Full Synchronization

- Compare and Sync
- Close – Hides the options window and leaves you with a blank FamilyInsight screen. You may use the available menu options or select a file.
- Exit – Closes FamilyInsight.

Opening from the Desktop Icon

Double click the FamilyInsight desktop icon. The program opens to a blank screen (if you have never used FamilyInsight on your computer) or to a list of recently used files. You can select a file from the list, click the **Open** icon to search your computer for a different file, or click on **Help** to get assistance or see if there are updates. If you want to open a different file, you may choose from a regular PAF 5 file (.paf) or backup (.zip) file, a GEDCOM file, a Family Tree Maker file or backup, or an Ancestral Quest file or backup. More file formats are being added currently.

Whether you are using a **Windows** or a **Macintosh** platform, you may also open a file by clicking on **File** from the Menu bar. The following options will appear:

- **Open** – Open any PAF, Ancestral Quest, Family Tree Maker or GEDCOM file
- **Recent Files** – Open a recently used file
- **Open Archive** – Open the FamilyInsight Archive and choose a backup to restore a file

Select your file and click **Open**.

Once you select a file, the **How would you like to start?** window appears. Choose a mode (function) by single clicking on the appropriate button.

We urge you to use the various modes (such as the Merge mode and the Edit Places mode) to clean up your records before you begin searching the IGI or synchronizing your records with the new **FamilySearch™** website. Some issues, like unrecognized place names, will prevent you from searching for records on the new **FamilySearch™** website until they are corrected or marked as valid. Taking time to correct your places to meet the new standards saves you time in the long run. You will also have to merge duplicate people or mark them as not a match before you can search for those names on the new **FamilySearch™** website. Cleaned records may result in more effective use of your search time and allow you to synchronize with the new **FamilySearch™** website immediately.

Window Arrangement

Each mode has several windows for displaying your information.

Individuals List window – **Upper left side** of the screen

- Lists the names of the people in your file.
- The **Edit Places** mode lists all your places instead of individuals.

Search Details window and/or the Primary Pedigree window – **Upper right side** of the screen

- **Search Details window** – Shows the various combinations of the individual's information as they are being sent to the IGI or the new **FamilySearch™** website. The program uses that information to perform your search.
- **Primary Pedigree window** – Displays the pedigree of the highlighted person. You may click on any name in the pedigree and their name will be selected in the Individuals List.

- **Tabs** – Navigate between these two options with the Tabs on the bottom side of this portion of the window by clicking either **Search Details** or **Primary Pedigree**.

Edit Places mode

Suggestions window – Upper right side of the screen.

- Offers suggestions when the new **FamilySearch™** website does not recognize your place name.

Search IGI, Simple Update and Full Synchronization modes

Details window – Lower part of the screen

- Displays the vital details of the person you have highlighted.
- Only information that is **highlighted in pink** is added by putting a check in the box. All other information that you want to add or update from the Secondary file, (the new **FamilySearch™** website, IGI, Compare and Sync or Merge modes) to the Primary file (your file) is selected from a drop down menu next to the name or event field. Your options are:
 - **Merge** – Overwrites the information in the primary record with the selected information from the IGI. You must select the information you want brought over.
 - **Add as # 1 (or other number)** – Adds the information on the right as the primary data for this event. Any information you had for the event will move to the **Other Events** section on your Edit Individual screen in PAF.
 - **Add as New** – Adds the information as new information under the **Other Events** section in PAF.
 - **Ignore** – Choose this if you do not want to update any information for this event. (This is selected by default, make sure you select the right option for your needs)
 - **Replace mine** – Replaces the selected information in your file with information from the new **FamilySearch™** website. Essentially the same thing as Merge.
- If there are multiple sets of parents or spouses, they will each be listed on a separate tab. Click on the matching names to bring the matching spouse or parent information to the top view

NOTE: In previous versions of PAF Insight, you could see all the fields for vital information (birth, christening, death, burial) whether they contained data or not. FamilyInsight only shows vital information fields with data. You will not see empty fields. If you update information from the IGI, the required fields will be added automatically as part of the update process.

- If you do not see this window, click **View**, in the menu bar, and select **Arrange Windows** from the list of options. This returns the window to the default settings.

Sorting Records

The Individual List is divided into various columns and your records are sorted to suit the specific mode. Sometimes the default for sorting records is by the Primary Surname, other modes sort by RIN, Pedigree or % Match. Except for the Pedigree and % Match headings, the others are explanatory.

- **Pedigree** – Edit RINs and Pedigrees mode. If there are unlinked pedigrees or individuals in your file, they are visible within FamilyInsight and numbered according to their size, from largest to smallest. The largest pedigree is called the Main Pedigree, the next largest is Pedigree 2 and so on.
- **% Match** – To assist you in evaluating the likelihood of two records being a match, FamilyInsight marks their probability with a percentage rating. Records with a lot of matching data receive a higher percentage rating than records with only a few pieces of matching information. Please do not automatically discount names with a low percentage rating. One record may have a great deal of data and the other record only a small bit of data but what does match may be identical. Carefully evaluate each possible match before dismissing records.

You may change how you sort your records by clicking on any of the column headings or by selecting an option from the **Sort by** field. There are two ways to sort the list.

- In any mode, you can sort by clicking any of the column headings in the Individuals List or Places List window.
 - If you click on the Primary or Secondary Name heading, the list will be sorted alphabetically by the names in that column. If you click on this heading again, the list will be sorted in the opposite order (i.e. A-Z or Z-A).
 - If you click on the Primary RIN or Secondary RIN heading, the list will be sorted numerically. Clicking on the RIN heading again will reverse the numeric order(i.e. 1-10, 10-1).
- The list may also be sorted by using the **Sort by** dropdown arrow located on the Toolbar.
 - Use this to sort by **Given** names as well as by any of the column headings such as Status, RIN, Primary Name, etc.
 - In the **Edit Places** mode the Sort by options consist of Largest to Smallest (jurisdictions), Smallest to Largest (jurisdictions), and Count.

Find

Use the **Find** field to quickly locate the information you need. Click your cursor into the **Find** field and type the name, place, or RIN you need. The highlight goes to the first occurrence regardless of it being a first, middle or last name of a person, a town, county, state or country for a place, or a RIN or percentage number. Click the **Find Next** button to jump to the next occurrence of the name. The **Find Next** and **Find Previous** buttons work in conjunction with the **Find** feature to locate a specific name or RIN in your **Individuals List** or **Place List** windows. In the **Edit Places** mode, **Find** only locates place names, not names of people.

After moving to other entries, you may click on the **Find Previous** button to return to previous entries that match your request.

Filter






Some modes have filters that control which names will appear in the Individuals List, according to the filter criteria. You can change the filter by clicking on the drop down arrow and selecting the desired filter.













Highlighting

Highlighting appears on some records to facilitate the comparing process.




- **Pink** – Indicates differences between the corresponding fields in the right and left side of the Details window. The differences may be major or minor.
- **Green** – Indicates no data in the corresponding field in the primary (left) side of the Details window and that the new data will be added automatically when you click the Update or Merge button.
- **Yellow** – Alerts
 - **Decision Needed** – All possible matches with this status must be marked as either a **Match** or **Not a Match** before you can synchronize records.
 - **Highlighted Pedigree number** – Indicates this person is not part of your main pedigree. You should try to link them to your main pedigree before proceeding to synchronize with the new **FamilySearch™** website.
- **Red** – Stops you from searching for this person and synchronizing them with the new **FamilySearch™** website until you resolve the problem.
 - **Merge needed** – The person may be duplicated in your records. Skip this person or open the Merge Mode. Merge all duplicates. Using the Tool bar icons, mark other pairs as “Not A Match” if they are not duplicates. When you are unsure, mark them for Research.

Icons and Buttons

- **Delete Button**  – When you click on this icon in the left hand side of the details window, you are deleting the event in your file that is listed on the same line as the icon. A verification window will come up to verify that you really do want to delete this information. When you click on the Delete icon in the Full Synchronization mode on the right (FamilySearch side), You will delete information that you have contributed to the new **FamilySearch™** website. If the icon is grey there is no information for that event or relationship that you have contributed. This means you cannot delete the information.
- **Notes Button**  – Notes concerning the individual, their name or life event. Click on the button to add or read a note. A green check indicates there is a note. If the notes are pink there is a difference between the notes in your record and the record you are comparing with.
 - If you are using a GEDCOM file from another program that has name and event notes, you will be able to read these notes in FamilyInsight.
 - While in FamilyInsight, you may add your own notes for the name or event but you will not see the in PAF, only in FamilyInsight.
- **Source Button**  – Click the button to add or read the source information for that event. A Green check indicates a source has been added.
- **Unrecognized/Recognized Place**   – A yellow dot along with the place highlighted in yellow indicates that the place name is not recognized by the new **FamilySearch™** website. Click the flag to select a standardized place name for searching. A gray flag indicates that the place is recognized by the new **FamilySearch™** website.
- **Ordinance Status Icons**

- Your file has ordinances in for this person.  
- You have synchronized this record with the new **FamilySearch™** website and there are ordinances that are ready to be done.  
- You need to synchronize relatives connected to this person.  
- More information is needed.  
- This indicates that this person's ordinances have all been reserved by you or someone else. You will not get this icon until you have tried to reserve this person's ordinances.  
- **Synchronized Icons**
- The two chain links symbolize the two databases; your record (on the LEFT) and the the new **FamilySearch™** website records (on the RIGHT).
-  The record has been synchronized.
-  The single link indicates that your record was linked when another record was synchronized but that this record has not yet been synchronized with the records on New FamilySearch. If you update a record in the Simple Update mode you will also get this icon. These records would need to be fully synced before you could reserve ordinance for a person with this link.

PAF Insight and FamilyInsight use pink highlighting to indicate differences. The program makes no judgment about the data but simply highlights differences between the records on the right and the left. Building upon the use of pink to indicate there is a difference the following applies.

-  When the right link (**FamilySearch™** side) is pink, something about that person's records has changed in the new **FamilySearch™** website.
-  When the left link (your file's side) is pink, something in your file has changed.
-  When both the right and the left links are pink, something has changed with both your file and the **FamilySearch™** file.
- **Other Buttons**
- **New** – Click to add a new event and/or person
- **Delete** – Click to delete the person from your file
- **Show/Hide Child/Children** – Click to show the children of that marriage
- **Parents, Spouse and Children** – These people appear in a field that is actually a button. Click to see there individual details.

Add New Individuals

After selecting a person, you may add their relatives by clicking on **Edit** in the Menu bar, or by clicking the **New** button at the top of the main Details window found in the center of you screen. The **New** button can also be found in the **Marriage** or **Parents** section of the Details window. Hover your mouse over “Add Relative” and choose either, Spouse, Mother, Father or Child. The **Add Person** window appears with options to "Link to existing person", "Add new person" or "Cancel".

- If the person you need is in your file but not linked to the selected person, choose **Link to existing person**.
 - A window opens listing all the people in your file.
 - Use the sort and find boxes to find your person.
 - Click on the person.
 - To verify they are the correct person, click on the **Details** button and review their data.
 - Click **OK** to close the **Details** window.
 - Click **OK** to link the person or click **Cancel** to end without linking them.
- If the person you need is not in your file, click Add new person.
 - Enter the new person's information into the template. You can specify the gender, enter their name, their birth, christening, death and burial dates and places, and add source citation information for each life event.
 - If you want to add an event or attribute that is not listed, click the **New** button, hover your mouse over **Event/Attribute** and select the correct option.
 - Click OK to close the data entry window.
- Click Cancel if you decide not to enter the information at this time.

The information is not permanent until you click Save.

You can delete the selected person from your file by clicking on the **Delete** button in the upper right hand corner of the Details window. Before you SAVE, you can restore the person by clicking on the **Restore** button. You cannot restore them if you have already clicked SAVE.

Add New Vital or Other Events Information

FamilyInsight does not display data fields that have no information. If you do not have a christening date or place for the person you have selected, you will not see that data box in the Details window of FamilyInsight. However, you can add new data to the person without returning to PAF. With the appropriate person highlighted click **Edit** from the menu bar and hover your mouse over **Add Event / Attribute** or click on the **New** button located over the person's name in the Details window. Hover your mouse over **Event / Attribute** and select from Birth, Christening, Death, Burial or "Other".... "Other" shows a list of predefined events found in PAF.

- You may choose an event from the list or click the **New** button to enter a new event type not found on the list.
 - **Title** – Enter an event type name. EXAMPLE: Commendation
 - **Short title** – If the actual title is short, you may repeat it or abbreviate it slightly. EXAMPLE: Commen
 - **Abbreviation** – Enter a 2 letter abbreviation. EXAMPLE: Cm
 - Select what information you want to enter for this event. Your options are **Use Date**, **Use Place**, **Use Description**, and **Use Confidential**.
 - Click **OK** to save the entry and close the window or click **Cancel** to exit without saving any changes.
- You may edit an event on the list by clicking the **Edit** button.
 - Edit as desired. Generally, you only edit the type of information you want to include by adding or removing the check for **Use Date**, **Use Place**, **Use Description**, and **Use Confidential**

The event box appears in the **Details** window where you can add the event information. Click on the pencil icon to add a source for the event.

Menu and Toolbar Options

Windows programs provide several methods for accomplishing a task. You can select what you want to do from the Menu, from Tools (small icons), or by right clicking to bring up an option window or menu. Each mode has the same Menu options (File, Edit, View, Mode, Action and Help) but some of the options within the menu are specific to the mode you use. ***Macintosh Users** – The Action menu is not available, however all the Action options are available on the Toolbar and by right clicking on a selected name.

Menu Bar Options – Click the menu item to see a list of options in that category.

- **File** – Pertains to your genealogy file
 - **Open** –
 - Choose the file type you would like to open.
 - **Recent Filest** –Choose a file from a list recently used files
 - Open Archive– Find an open a backup file created by FamilyInsight. Located in My Documents > FamilyInsight > Archive
 - **Save** – Save the changes and updates you made while using FamilyInsight
 - **Save As** – Save the file with a new file name to preserve both the original file and save the changes to the new file
 - **Close** – Close the file you have open but keep FamilyInsight running
 - **Exit** – Close FamilyInsight

***Macintosh Users** – The equivalent of **Exit** can be found in the menu bar under **FamilyInsight** as the **Quit FamilyInsight** option.

- **Edit** – For changes to your genealogy file
- **Cut** – Copies and removes the highlighted data in the Details window and places it on an “electronic clipboard”.
 - Cut data can be pasted into another area by clicking into the appropriate field and selecting **Paste** from the **Edit** menu.
 - You can also click the **Paste** icon in the **Tools** menu or right click in the field where you want the information and select **Paste** from the popup menu.
- **Copy** – Copies highlighted data in the Details window and places it on an “electronic clipboard”. Copied data can be pasted into another area by clicking to the appropriate field and using Edit and selecting Paste. You can also click the Paste icon in the Tools menu or right click in the field and select Paste from the popup menu.
- **Paste** – Puts copied or cut information where you have your cursor.
- **Add Relative** – Manually enter a new person into your file as you would in PAF
 - Spouse, Mother, Father or Child
- **Add Event/Attribute** – Manually add a new event or attribute to the selected person
 - Birth, Christening, Death, Burial, Other... (brings up the PAF list of “other events” to choose from)
- **Add Note** – Add a note to the selected person
- **Add Citation** – Add a source citation to an event
- **Preferences** – Opens the Preference window so you can select the options you want for

FamilyInsight. There are five tabs with preference options.

***Macintosh Users – Preferences** can be found in the menu bar under **FamilyInsight**.

- **General**
 - **Data folder location** – Displays the path for finding the data folder containing your Archived files, cached searches and places, Not A Match files, etc.
 - **Sources option** – By default this option is unchecked “ When selecting an event, select its source too”
 - **Multimedia and Citation Images** – Choose whether or not to “Ignore multimedia and citation images when updating or adding individuals”. If you have multimedia links, you may want to remove the check. If you do not have multimedia links, keep the default setting with the check by “Ignore...”
 - **Updating Application** – Automatic update options
- **FamilySearch™**
 - **Add FamilySearch™ ID as Custom ID** – Default is checked
 - **Add FamilySearch™ ID, but not as Custom ID** –
 - **Ignore FamilySearch™ ID** –
- **International Genealogical Index (IGI)**
 - **Only show IIGI matches that contain additional ordinance information**– Personal choice
 - **Leave most recent IGI Search source only**
 - **Options for the search cache** – Default set to 2 days
 - **Clear cache button** – Clear the search cache to force a new search instead of using the cached search.
- **Options for updating your records for new parents or spouse** – Personal choice – Applies to both the IGI and the Full Synchronization mode
- **Retrieve and show all hits (Slower – Not Recommended)**

NOTE: We can no longer store your the new **FamilySearch™** website username and password therefore, we removed it from the Preference window.
- **Archives**
 - Overview of what the Archives does and how it is “pruned”
 - **Keep Archives option** – Default set to keep the archives
- **Match**
 - **Percentage match options** – Default set to 0 (zero)
 - **Ignore case option** – Default is to ignore case
- **Place Editor**
 - **Place name cache option** – Default set at 3 months
- **View** – Affects the look of the FamilyInsight program
- **Details** – Window showing all the personal information of the selected person. Hover your mouse to see more options.

NOTE: A check by any of the options indicates the section is visible. No check means the section is turned off or not visible. Click the option to add or remove the check.

 - **Details** – Turns the entire Details window on or off
 - **Person’s Events / Attributes** – When checked, you see the details of the selected person’s life such as their birth, christening, death, burial, etc.

- **Marriages** – When checked, you can see the selected person’s marriage information, the spouse's name, and their children. What you see in this section depends upon what you have in your file.
- **Parents** – When checked, you can see the selected person's parents. What you see in this section depends upon what you have in your file.
- **Person’s Notes** – When checked, the note section is displayed with any notes you have for the selected person. You may add notes to the record on the left (primary person) while in FamilyInsight.
- **Suggestions** – Window displaying alternative formatting or names for places that need clarifying
- **Search Details Search IGI and Full Synchronization** – Window showing how your data is submitted to the IGI for searching. Also indicates the search is progressing
- **Primary Pedigree and/or Secondary Pedigree** – Shows the pedigree of your selected or highlighted person
- **Place Editor** – Shows the window with your list of places
- **Font / Size** – Select your own font and font size
- **Arrange Windows** – Returns the window to the default settings with all the required components. (Individuals List and Details windows, etc)
- **Toolbars**
 - **File Edit Toolbar** – Guide Me, Open, and Save Toolbar options
 - **Edit Toolbar** – Cut, Copy and Paste Toolbar options
 - **Toolbar for the specific mode** – Edit RINs Toolbar, Merge Toolbar, etc.
 - **Navigation Toolbar** – Sort by, Find, Find Next, Find Previous, and green Up and Down arrows which moves the highlight to the next person either up or down on the Individuals List
 - **Internet Activity Toolbar** – Web Traffic
- **Mode** – Click this to change from one mode (function) to another within FamilyInsight
- **Action** – Options for accomplishing specific tasks. The options vary depending on the mode your in. ***Macintosh Users** – The Action menu is not available as described here, however, all the same Action options are available on the Toolbar.
- **Add** – In the Compare and Sync mode, adds a person from the Secondary file to the Primary file. Use this when the person is NOT already in the Primary file. In the **Full Synchronization** mode, adds a person from your file to the the new **FamilySearch™** website.
- **Log Out** – If you are logged into FamilySearch, you can use this action to log out if you want to log in for someone else.
- **Reconnect** – If you have logged out or have been disconnected and FamilyInsight has not been able to connect you again, you will have this option available.
- **Match** – Indicates the selected pair in the Merge mode are the same person. Also, marks the person in your file and the ones found in the new **FamilySearch™** website as the same person. Once marked as a match, the records are combined in the new **FamilySearch™** website.
- **Merge** – Combines two records of the same person into one record and updates the selected information
- **Not A Match** – Marks your records so they will not show up on the Possible Duplicate list in the Merge mode. Depending upon your preference setting, it may put a note in the Notes window indicating that these two people are not a match
- **Search** – Depending upon which mode you use, looks for the selected person or people in the

Internet IGI or in the new **FamilySearch™** website.

- **Stop**
 - **Stop This Search** – Stops the current search and moves to the next search if more than one person was selected for searching
 - **Stop Search** – Stops all searching
 - **Separate** – Used to separate people that were improperly combined in the new **FamilySearch™** website.
 - **Update** – Adds selected information from the secondary file to the primary file in the Search IGI, Simple Update and Compare and Sync modes
 - **Unlink** – Removes **FamilySearch™** Person IDs from a record.>
 - **Year Range** – Expands the search from the exact year shown in the selected person's records to include additional years. Important for thorough searching of the IGI.
 - **Compact** – Saves space by changing the individual RINs to start with one and continues with no gaps, thus recovering the space from unused RINs. Compacting changes many RINs as it moves the records to fill in the spaces. If you rely heavily on RINs, you may not want to use this feature.
 - **Trim** – If you need to remove unwanted individuals, this option is very useful. You can Delete the individual entirely, Ancestors of the Individual, Descendants of the Individual, the entire pedigree, or Trim to the Individuals direct line. (Children, Children's Spouses, Grandchildren, and Grandchildren's Spouses can be selected to keep)
 - **Restore** – Returns deleted people to your file if you use it before saving your changes. Once changes are saved, restore does not work
 - **Research** – Places a **Research for Merge** note for the selected pair of people in the Merge mode. Places a **Research for Trim** note for the selected person in the Edit RINs and Pedigrees mode.
 - **Reserve Ordinances** – Opens the Reserve Ordinances window for the person you have selected and their close relatives.
 - **Switch** – Switches the primary and secondary person in the Merge mode. Use this to edit information in the secondary person's record. Switch is ONLY available in Merge mode
 - **Tools** – links to additional options
 - Get My Ancestors – the same as the standalone program but with more save options.
 - Ordinance Tracker – View and manage the names you have reserved on FamilySearch
 - Preferences – An additional link to the program preferences setting window.
 - **Help** – Find answers to questions, lessons, link to our website, etc.
 - **Help** – Opens the Help pages and lessons for FamilyInsight
 - **Check for Updates** – Checks to see if there is a newer version of FamilyInsight
 - www.ohanasoftware.com – Direct link to our Home Page
 - **About FamilyInsight** – Displays the following information:
 - A direct link to the support page of our website
 - Registered to: Your name as we have you registered
 - The program version number
 - OK – Click to close the window
 - License and Copyright – Select to view the End User License Agreement for FamilyInsight
- ***Macintosh Users** – **About FamilyInsight** can be found in the Menu bar under

FamilyInsight.

- **Feedback** – Easy way to send an email to Ohana Software.
- Click Feedback and you will see "Submit a Question or Comment to Ohana Software"
- When you chose to submit a Question, the Ohana Software feedback page will open in your browser window.
 - Enter your email address. Please verify that this is correct so that you will get our response to your message>
 - Enter your question or comment. The more information you give in your comment the better we can answer your question
 - Click on the Submit button
- You should receive your answer by the end of the next business day.

Toolbar Options

- **Toolbar Options** – Icons that duplicate the most commonly used Menu Options. These options vary depending upon the mode.
- **Add** – In the Compare and Sync mode, adds a person from the secondary file to the primary file. Use this when the person is NOT already in the primary file. In the **Full Synchronization** mode, adds a person from your file to the new **FamilySearch™** website
- **Guide Me** – Brief explanation of how to start or what to do next, based on what is highlighted.
- **Match** – Indicates the selected pair in the Merge mode are the same person. Also marks the person on the new **FamilySearch™** website is the same as the person in your file.
- **Merge** – Combines two records of the same person into one record and updates the selected information
- **Next** – Moves the highlight to the next person on the Individuals List
- **Previous** – Moves the highlight to the previous person on the Individuals List
- **Not A Match** – Marks your records so they will not show up on the **Possible Duplicate** list in the Merge mode. Depending upon your preference setting, it may put a note in the Notes window indicating that these two people are not a match
- **Open** – Opens a new file
- **Save** – Saves the changes and updates your file
- **Search** – Looks for the selected person or people in the Internet IGI or the new **FamilySearch™** website, depending upon which mode you are in.
- **Search exact year** – Expands the search from the exact year in the selected person's records to include additional years. Important for thorough searching of the IGI.
- **Stop**
 - **Stop This Search** – Stops the current search and moves to the next search if more than one person was selected for searching
 - **Stop Search** – Stops all searching
- **Synchronize** – A two-way updating of records; adds your data to the new **FamilySearch™** website and puts information from the new **FamilySearch™** website into your file.
- **Separate** – Used to separate people that were improperly combined on the new **FamilySearch™** website.
- **Update** – Search IGI, Simple Update and Compare and Sync

- **Cut** – Deletes selected information and places the data on the “electronic clipboard” so you can paste it into another area
- **Copy** – Leaves the selected information and also places the data on the “electronic clipboard” so you can paste it into another area
- **Paste** – Places the cut or copied data stored on the “electronic clipboard” into the field where your cursor is blinking
- **Trim** – If you need to remove unwanted individuals, this option is very useful. You can Delete the individual entirely, Ancestors of the Individual, Descendants of the Individual, the entire pedigree, or Trim to the Individuals direct line. (Children, Children's Spouses, Grandchildren, and Grandchildren's Spouses can be selected to keep)
- **Restore** – Returns deleted people to your file if you use it before saving your changes. Once changes are saved, restore does not work.
- **Research** – Places a **Research for Merge** note for the selected pair of people in the Merge mode. Places a **Research for Trim** note for the selected person in the Edit RINs and Pedigrees mode.
- **Change RIN** – Assign a new RIN for individuals in your file
- **Compact** – Reassign RINs so there are no unused RINs in your files. Use with caution if you depend heavily upon your RINs.
- **Web Traffic** – Shows when there is Internet traffic between FamilyInsight and **FamilySearch™**

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