

# Reserve Ordinances Using FamilyInsight

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## Overview

The new **FamilySearch**<sup>TM</sup> website contains records from many resources including the IGI (International Genealogical Index), the Ancestral File, Pedigree Resource File, membership records from The Church of Jesus Christ of Latter-Day Saints, etc. In many cases, there are several duplicate entries of the same person, each with various amounts of information. Think of each entry as a piece of paper with information about your ancestor. One way of organizing paper records is to put all the various papers for an individual into a folder. Our job in **FamilySearch**<sup>TM</sup> family tree is the same; find all the entries for one person and combine them. Unlike merging, where you have to decide what information to keep and what to discard, combining keeps all data in one "folder" so nothing is lost.

Synchronizing your records accomplishes more than just exchanging information between your database and the new **FamilySearch**<sup>TM</sup> website; it also cleans up your portion of the family tree by combining duplicate records that you mark as a Match.

If you have a record you would like to submit for ordinances, you need to synchronize this record first. This will prevent duplication in case there are multiple records.

You can then reserve the name for ordinances directly from FamilyInsight and print Family Ordinance Requests from the FamilyInsight Ordinance Tracker for any names you have reserved either on FamilySearch or using FamilyInsight.

## Quick Guide

- Open FamilyInsight and select **Full Synchronization**
- Enter your new.familysearch.org username and password
- Synchronize your personal record if needed
- Select a name that you want to reserve ordinances for and search and synchronize with the new **FamilySearch**<sup>TM</sup> website if this was not done previously.
- Wait for the search results and mark the matches and click on synchronize.

- If there are no matches, the status is **Ready to Add** - Click the **Add** icon
- If there are other members of their family that you want to submit, follow the same procedure for each of them that has not yet been synchronized.
- Next go to the Action Menu and choose "Reserve Ordinances" from the drop down.
- Select the ordinances you would like to have done from the Ordinance Reservations window.
- Click OK.
- Read the policy statement that comes up and check if you agree and then continue.
- Look over your submission list
- Click on Finalize Reservations
- The Ordinance Tracker will load
- The selected individuals will be added to the Ordinance Tracker (All individuals you have reserved previously will also be on this list.
- Drag ordinance cards to the appropriate preview. Unreserve, Assign to Temple, or Print Family Ordinance Request.
- Finalize decision by clicking the correct button.
- If Printing Family Ordinance Request, click Print in the viewer that it is opened in.

## Signing on to new FamilySearch™ with FamilyInsight

When the new **FamilySearch™** website becomes available in your area, you must register with the website before you can use it. Registration from the original **FamilySearch™** website at [www.familysearch.org](http://www.familysearch.org) does not grant you access to the new **FamilySearch™** website. If you have not already registered on the new **Family Search** website and it is available in your temple district, please go to [new.familysearch.org](http://new.familysearch.org) and click the green link that says, "**Register for the new FamilySearch**". When you register, you will create a login username and password. Take careful note of this information, as you need it for FamilyInsight.

### Helper Function

If you are helping someone without a new **FamilySearch™** login to reserve ordinances, you should login as a Helper from the Login screen as you enter FamilyInsight Full Synchronization mode or Ordinance Tracker.

- To do this, enter your login information and then check the box next to "Login to help someone else".
- This will open a section to enter their information. " Who are you helping"?
  - Name: This should be their full name as on their membership record
  - Birthdate: This date should be entered as you would in database manager. Example: 22 Jan 1948
  - Access Number: This is the last 5 digits of a persons membership number
- You will see the statement on the title bar that you are logged in as a helper for whomever you are helping.

Anything you do in new FamilySearch logged in as a Helper for someone else will show in new **FamilySearch™** as if they had done it themselves.

# Ordinance Reservations

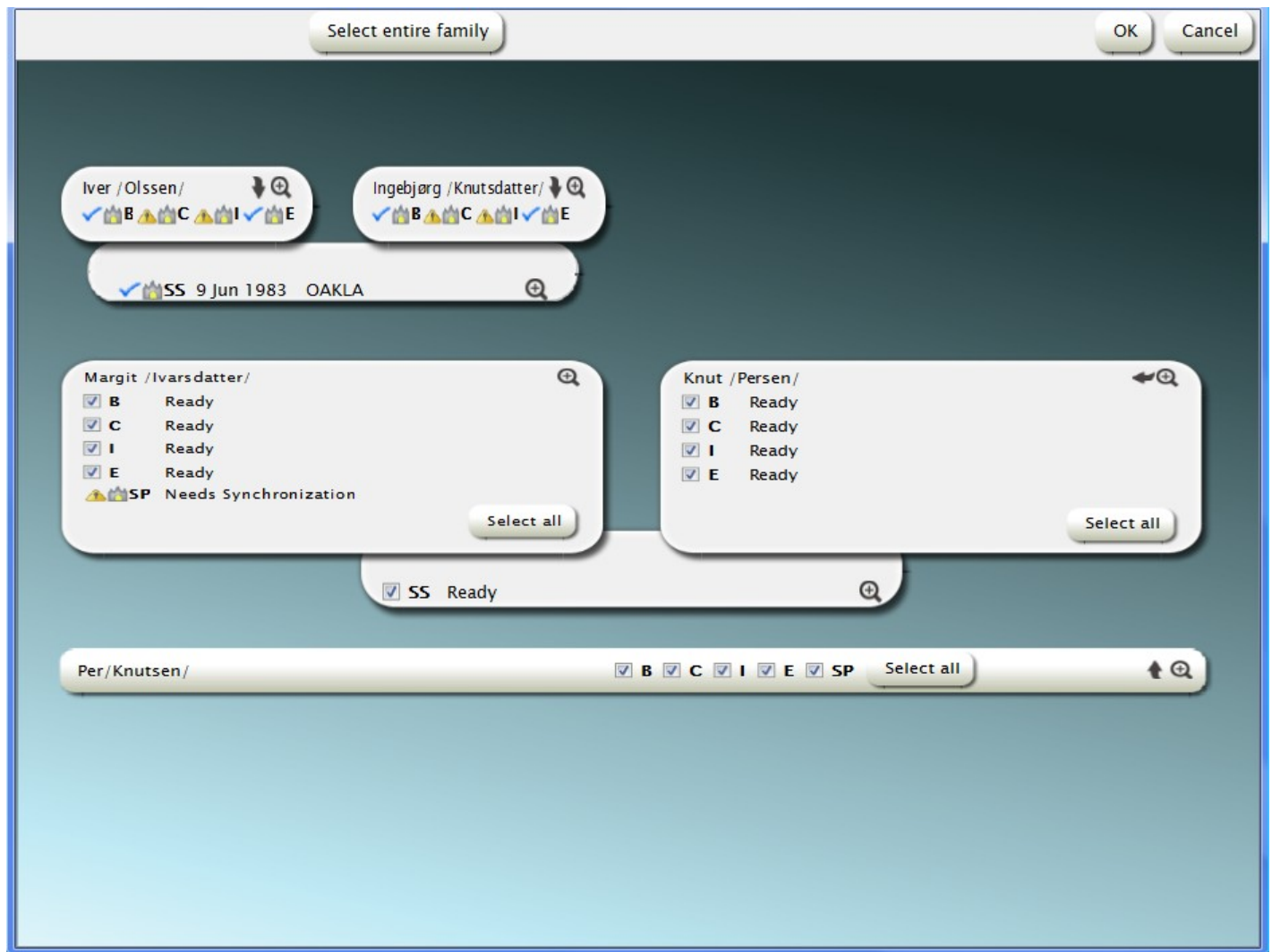
In order to reserve a persons ordinances in FamilyInsight you must first synchronize their record using the Full Synchronization mode in FamilyInsight. If you would like more information on how to do this please refer to the lesson or the video on Synchronizing your file with New FamilySearch. Both of these are available on the lessons page at [www.ohanasoftware.com](http://www.ohanasoftware.com).

It is required that you synchronize parents and spouse of a person if you want to do any sealing ordinances for them.

After you have Synchronized the individual or family you would like to reserve ordinances you are ready to Reserve Ordinances. There are three ways to do this.



- 1.Right click on one of the individuals in the family and select Reserve Ordinances from the menu that comes up.
- With an individual selected click on the tools menu and choose Reserve Ordinances.
- 1.Click on the icon Reserve Ordinances. You may need to click on the >> to the left of the web traffic icon to expand your toolbar to see all the icons.

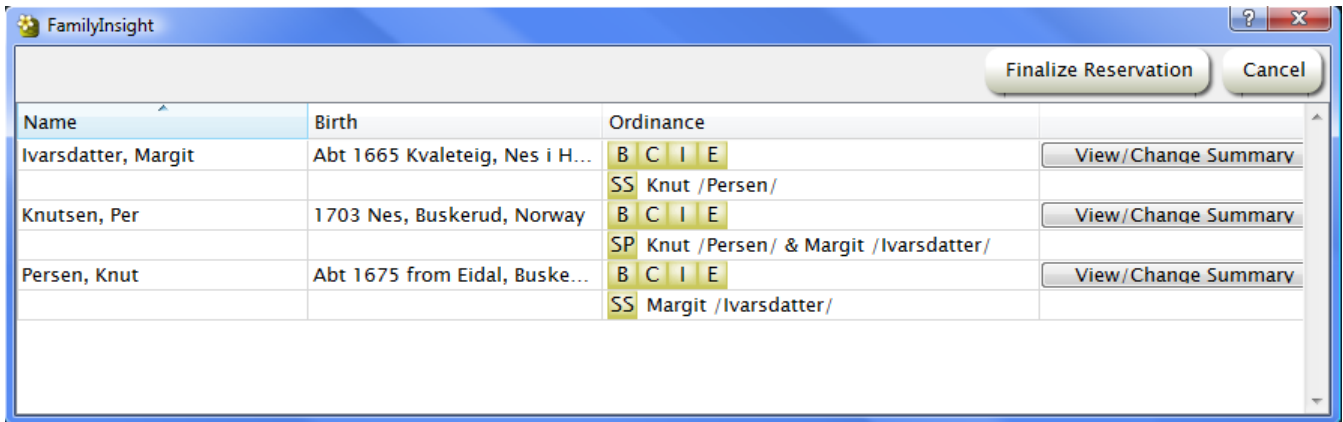
The Ordinance Reservation window will open.



- Check the boxes for the ordinances you want done. You can do this individually or click the

Select all for a person or for the entire family.

- To navigate to attached family members use the arrows  next to the magnifying glass.
- Clicking on the magnifying glass  will open a window for that person with more details.
- When you have selected all the individuals you want. Click on OK.
- The Church Policy Agreement will be shown and you should read it. Then check the box to indicate you have read and will comply before you can continue. Then click on "Continue".
- The Finalize Reservations window will open

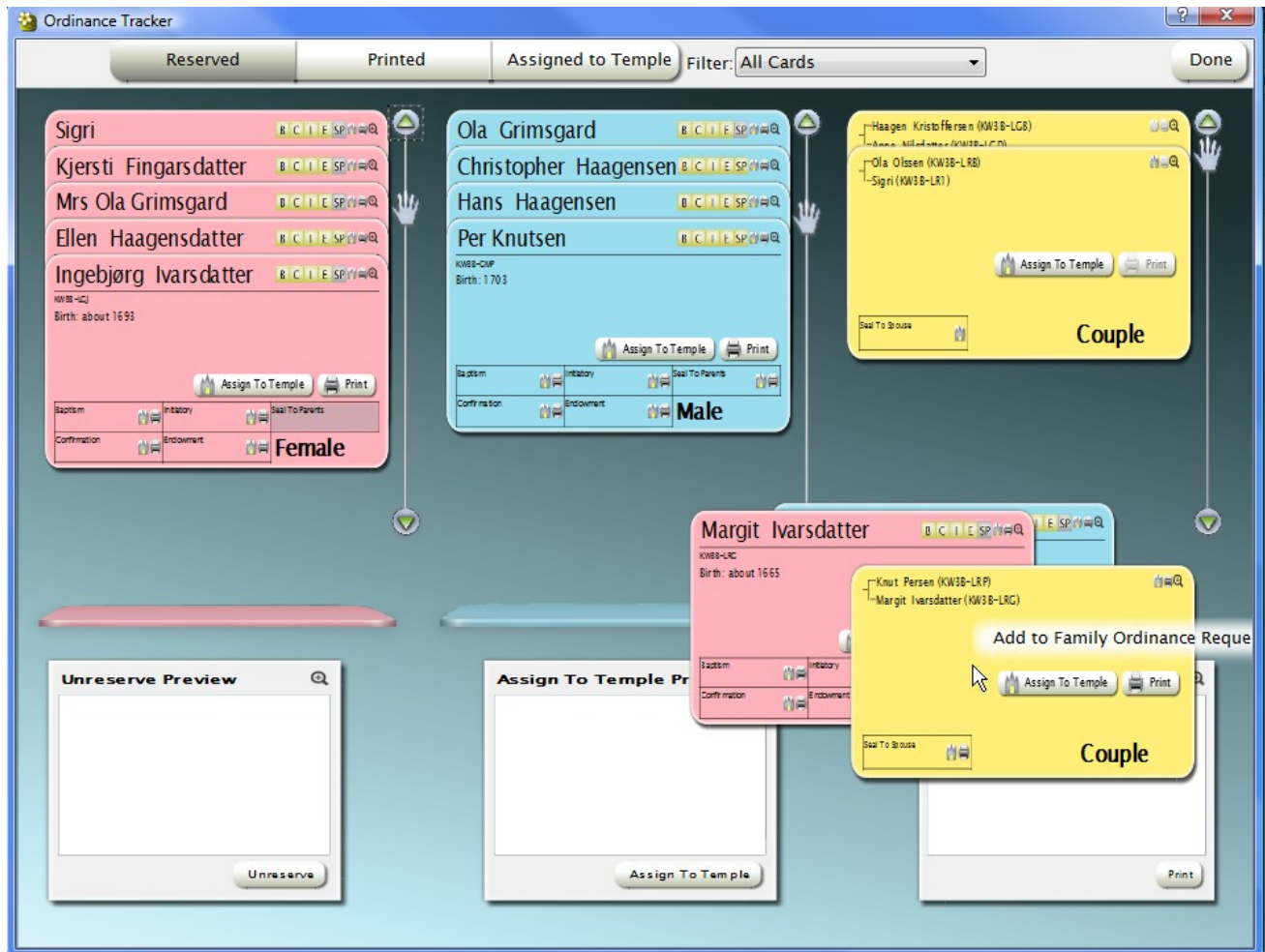


Verify that the listed people and ordinations are what you desire to reserve.

If you want to change the summary information that will be printed on the cards, click on View/Change Summary and choose from the available data. Click OK.

Click on Finalize Reservation to continue to the Ordinance Tracker Window or choose Cancel to cancel the reservation.

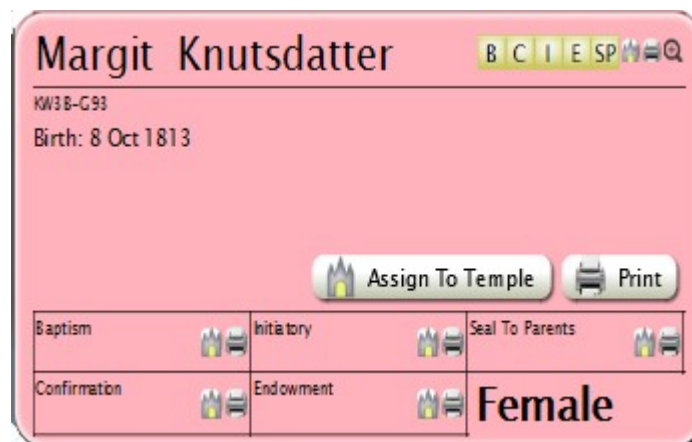
# Ordinance Tracker



The Ordinance Tracker shows all the ordinances you have reserved. There are three views.


- Reserved – Shows all those that are reserved but not printed.
- Printed – Shows all persons whose cards have been printed.
- Assigned to Temple – All those that the temple has been asked to do the ordinances.

There is a card for each person and for each sealing to spouse reserved.



## Reserved View


You can send this card to the Family Ordinance Request preview in several ways:

1. Drag the entire card to the image of the Ordinance Request Preview in the lower right corner.
2. Clicking on the "Print" button for the individual card.
3. Click on the small printer icon  in the ordinance field for the ordinance you want to select.
  - If you select to do the Initiatory and the Baptism and Confirmation is not done, all three ordinances will be selected and added to the Ordinance Request.
  - If the baptism and confirmation has been assigned to the temple and has not been completed yet you will not be able to send any further ordinances to the Ordinance Request preview for this person until the Baptism and Confirmation assigned to the temple is completed..

When you click on the "Print" button on the Family Ordinance Request Preview the Family Ordinance Request will come up in Adobe Reader or another PDF viewer and you should print it by choosing print in that program. Take this printed document to your temple and they will print the temple cards for you.

The ordinances will be removed from you Reserved list and added to the Printed View.

If you want ordinances done by the temple instead of doing them yourself, you can send a card to the Assign to Temple preview. in several ways:

- Drag the entire card to the image of the Assign to Temple Preview in the lower right corner.
- Clicking on the "Assign to Temple" button for the individual card.
- Click on the small temple icon  in the ordinance field for the ordinance you want to select.
  - If you select to do the Initiatory and the Baptism and Confirmation is not done, all three ordinances will be selected and added to the Assign to Temple Request.

When you click on the "**Assign to Temple**" button the ordinances on the Assign to Temple Preview will be taken off of your reserved list and added to the Assign to Temple view.

If you find a reservation that you reserved by mistake or for some other reason you do not want to leave reserved, you can unreserve a name. To do this, click on the card and drag it to the Unreserve Preview. When you click on the "Unreserve" button the name(s) on the Unreserve Preview will be taken off of your reserved list and available for anyone else on FamilySearch to reserve.

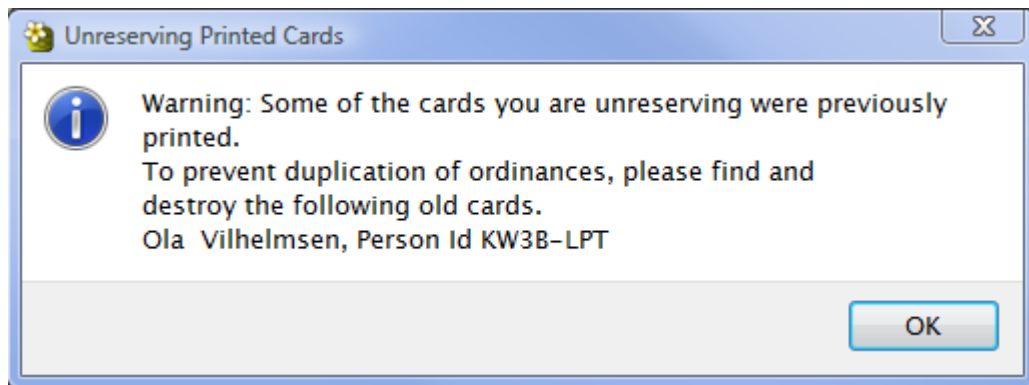
## Printed View

All of the cards you have printed and are not completed will be shown in the Printed View in the same manner as the Reserved view.

- You can reprint these cards by clicking on the "Reprint" button or the print icon.
- You can also drag them to the Family Ordinance Request Preview to have them reprinted.

If you find a reservation that you reserved and printed by mistake or for some other reason you do not want to leave reserved, you can unreserve a name. To do this, click on the card and drag it to the Unreserve Preview. When you click on the "Unreserve" button the name(s) on the Unreserve Preview will be taken off of your reserved list and available for anyone else on FamilySearch to reserve.











A warning will come up telling you to destroy any card that you have previously printed and give you a list of the names and Person IDs





## Assigned to Temple View






From the Assigned to Temple view you can Unreserve and Assign back to you again. This can only be done for cards with ordinances that have not been sent to temples to do yet. They will still say "Assigned to Temple" in the ordinance box. If they say "Completed" or "In Process, Temple" in ordinance boxes, those ordinances cannot be unreserved or assigned back to you with the "Assign to Me" preview box.

## Icons, Colors, 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**<sup>TM</sup> 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.
- **Ordinance Status Icons**
  - Your file has ordinances in for this person.  
  - You have synced this record with FamilySearch family tree and there are ordinances that are ready to be done.  
  - You need to sync 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 **FamilySearch™** family tree records (on the RIGHT).
-  The record has been synchronized.
-  When the right link (**FamilySearch™** side) is pink, something about that person's records has changed in **FamilySearch™** family tree.
-  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.
-  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.

### Ordinance Tracker Icons

- Click on temple icon to assign ordinances to be done by the temple 
- The print icon  to send ordinances to the Family Ordinance Request preview or to reprint from the printed cards.
- This is the assign to me icon 

### Color coding for Ordinance Tracker

-  Yellow indicates that this ordinance has been reserved but not printed yet.
-  Gray indicated that the ordinances are on hold, completed, assigned to the temple or not available for some reason.
-  Green indicates that the ordinances are printed and in process.

## Adding People from Your File to the new FamilySearch™ website

When there are deceased people in your file, not listed in **FamilySearch™** family tree, you can add them using FamilyInsight. If you want to reserve ordinances for anyone not already in FamilySearch you will need to add them.

- To insure the new person is properly linked within FamilySearch family tree, search for and synchronize the person or people they are related to, such as their parents or their spouse.
- Find the person in your file that you want to add.
- Search for him or her on the new **FamilySearch™** website using FamilyInsight.

- If they cannot be found, the status will be marked as **Ready to Add**.
- Click the **Add** icon to add them into **FamilySearch**<sup>TM</sup> family tree.

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