


Using FamilyInsight Simple Update with new FamilySearch™

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Quick Guide

Although we provide these brief instructions, you may also get step-by-step guidance, by clicking the

Guide Me  button in the **Toolbar**. The instructions change depending upon what actions you have already performed and/or which person is selected.

- Open your file in FamilyInsight and select the Simple Update mode.
- Enter your **new.FamilySearch.org** username and password as required.
- Choose who you want to show in your list of individuals. Either Show all or Show persons who are missing ordinances.
- When "Checking Places" disappears for the names you want to search, select a name or names to search.
- Click the **Search** button.
- If FamilyInsight finds a possible match for your person, click on the name in the **FamilySearch™ Name** column of the **Individual List** window.
- Compare the information you see in the **Details** window at the bottom of your screen to verify that they are the same person. Your info is on the left, the FamilySearch info is on the right.
- Select any information from the FamilySearch™ records (right side) that you want added to your file.
- Click the **Update** button.
- Continue through the list of possible matches and update as you find new or better information.

- Save often.

Starting FamilyInsight

For complete details on opening FamilyInsight, please read [Lesson 1: Getting Started](#) but in brief:

- Open the file you want to use in PAF then click on Tools, in the menu bar, and select FamilyInsight or click on the desktop icon to open FamilyInsight directly and then choose your file.
- From the **Choose a Mode** window, select **Simple Update**.
 - From the FamilyInsight window click on **File**, on the menu bar, and choose **Open** or **Open Backup**.
 - Select your file and click **Open**.
 - Select **Simple Update**.

Each time you use the Simple Update mode in FamilyInsight, you must enter your **new FamilySearch™** user name and password. This is the username and password you created when you registered at **new.FamilySearch.org**, not the one for Ohana Software. If you do not have a username and password from **new FamilySearch™** and are in an area that is allowed access to new **FamilySearch™** you may create one, free of charge, by registering at new.FamilySearch.org. At this time you must be LDS and have your membership number and confirmation date to register.

When you have successfully signed into New **FamilySearch™**, the messages concerning accessing **FamilySearch™** and submitting your username and password will disappear. You are then ready to begin searching.


- If there is a problem with the Internet connection, a warning appears.
 - If this happens, you should check your Internet connection and ensure that you set the firewall to allow FamilyInsight to access the Internet.
 - We **do not** recommend that you turn off your firewall

Simple Update: How to find matches & import data from the new FamilySearch™ website

- Find the person or people you want to search for by clicking into the **Find** field located just above the Primary Name column. Type in the RIN or the name of the person you want to find. The highlight bar jumps to the first occurrence of that name or number on the **Individual List**. Click the **Find Next** button to find the next occurrence of the name or number on the

Individual List. Once you have moved to a second name, you may use the **Find Previous** button to return to a prior listing of the name.

- Select an individual by clicking on their name and once their status is no longer "Checking

Places", begin the search by either clicking on the **Search**  icon button in the Toolbar, by choosing **Search** from the **Action** menu or use the shortcut keys **Control+F**.

***Macintosh Users** – The Action menu is not available as described here or elsewhere in this lesson, however, all the same Action options are available on the Toolbar.

- FamilyInsight allows you to [multiple select](#) groups of people to search. Searches occur one at a time in the order they were selected. For your convenience, the search progress is noted in the **Status** column of the **Search Details** window, which changes from **Retrieving**, to **Done**.

FamilyInsight Simple Update searches the new **FamilySearch™** website (new.familysearch.org). It searches using the information and places in your file. If a place is not recognized by FamilySearch™ or there is more than one possible match to this place, a window will open and tell you that a place is not recognized by new.familysearch.org.

- The place will be listed in the window and you will have the following options.
 - **When searching new.familysearch.org Use:**
 - You then choose a place from the dropdown list that you want to be used when searching.
 - **Don't use this place for searches. This will tell FamilyInsight to search only based on other info provided for the individual.**
 - Check the appropriate option for this place
 - Click OK

After searching begins, possible matches are added to the **FamilySearch™ name** column with the % match possibility listed in the next column to the right.

Select a pair of matching individuals by clicking on one of their names. Their vital records information is displayed, side-by-side, in the **Details** window at the bottom of your screen. The person in your file appears on the left and the FamilySearch™ person appears on the right. Use the scroll bar, within the Details window, to compare all information.

For more information about the Details window icons, please read [Lesson 1: Getting Started](#) under the heading **Details Window Icons**.

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 that contain data. You will not see empty fields. If you update information from the FamilySearch™, the required fields will be added automatically as part of the update process.

Differences between information in the FamilySearch™ record and the record in your file are **highlighted in pink**. When information appears in the FamilySearch™ file and the corresponding field in the primary file is empty, the data is **highlighted in green**. This information is added automatically if you update from this FamilySearch™ record unless you change the option for adding to ignore.

Make sure you select the information that you want to have added to your file before you click Update. Selecting the information that you want added to your file has changed somewhat from previous versions of Insight.

Your options are:

- **Add as #1** – This 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 Individual screen of your file.

- **Add as New** – Adds the information as new information under the Other Events section in your file.
- **Ignore** – Choose this if you do not want to update information for this event.
- **Replace mine** – Replaces the selected information in your file with information from the **FamilySearch™**. Essentially, this is the same thing as merging. Information that is **highlighted in pink** is added by putting a check in the box next to the piece of information that you want added to your file. If you already have data for a date or place and choose to check to add information with this option, the new information will replace the information you had in your file.

For Marriage events, choose the marriage on the right that you want to match with a marriage in your file. If there is more than one marriage, you will need to select the correct marriage from the Spouse dropdown on the right above the name of the visible spouse. If you choose "Spouse 2 James Allen Taylor", the marriage information for that marriage will be made visible.

Then choose whether you want the marriage information from the new **FamilySearch™** website added to your file. From the drop down box above the marriage information, choose from the following:

- **Match with Spouse # Name** – This option allows you to indicate that the couple in the new **FamilySearch™** website is the same as the couple with that spouse found in your records and prevents duplicates in your file. If there are multiple tabs with spouses that are the same you should go to their personal records in your file and sync them to combine duplicates on FamilySearch.
- **Add** – This adds the marriage as a new marriage for the individual when you update your records.
- **Ignore** – If you choose this option, no marriage information will be added to your file when you update your records.

Next, decide how you want to transfer the actual marriage event data and/or the sealing information. Using the same options as listed above for individual data.

For Parent information, choose the parents on the right that you want to match with the parents in your file. If there is more than one set of parents, you will need to select the parents from the parents dropdown on the right above the names of the visible parents. If you choose Parents 2 Robert and Mary, those parents will be visible.

Then decide how you want the parent's from the new **FamilySearch™** website added to your file. The choices are:

- **Match with Parents # and Names** – This matches the FamilySearch™ parents with the couple in your records for the corresponding parent names.
- **Add** – Adds the individuals listed as a new set of parents.
- **Ignore** – Choose this if you do not want to add or update any information for parents.

When you select the information that you want in your file, either click on the **Update** icon or choose **Update** from the **Action** menu.

The updated information will appear in the individual's record on the left. If you want to make other changes, you can edit the information while in FamilyInsight, directly in the **Details** window.



If an individual in your database has parents or a spouse in FamilySearch™ that you do not have in your database, and you choose to add them, new records will be created for these individuals in your

file. You should be sure to research any information you add from FamilySearch™.

If your search for a person and they do not have possible matches in FamilySearch™, you will see "Search Completed" in the Status column but there will not be any matches to compare.

Stopping a Search

Sometimes you may want to stop one search and move to another search. You have the following options listed under the Stop icon on the toolbar or the Action menu list:

- **Stop Search**  – Stops all active searching of FamilySearch™ and all searches marked as "waiting".
- **Stop Current Search**  – Stops searching FamilySearch™ for the individual currently being searched. The status changes to Canceled in the Search Details. If there are names marked "Searching", the program starts searching FamilySearch™ for the next individual on the list.

These commands are under the Stop on the Simple Update tool bar. If you do not see the Stop icon, it may be covered by the Internet Activity tool bar. Hold your mouse over the vertical line to the right of the Web Traffic icon until you see the cross and then click with your mouse and slide the line to the right.

Saving Your Work






Nothing is saved in your database until you **Save** or **Save As**. The **Save** option overwrites your original file with your new information. It keeps the same file name as before. **Save As** creates a new database with a file name of your choosing. To do this, click on the **File** menu and choose **Save As** and choose the type of file you want to Save As. The choices are: PAF, Ancestral Quest, Family Tree Maker 2010 or 2011, or GEDCOM files. Other file formats will be added shortly. Type in a new file name, and click **Save**.

- If you choose the **Save As** function, be aware that your original file will not be changed and the FamilySearch™ updates will not appear on that file. When you return to your database program, you must open the new file, saved with the new name, in order to see the FamilySearch™ updates.
- It is wise to save your work periodically during the session. You may either use **Save** or **Save As**. **Save As** changes the file name for the duration of your session. After you change it the first time, you need only click the Save icon.
- You may save your work while the program searches FamilySearch™. You do not have to stop active searches to save your work. You will not lose information when you save.
- If you do not save your work as you go, you must save before exiting or lose all your updates. As explained above, either use **Save** or **Save As**.










If you exit FamilyInsight before saving your changes, a warning appears asking you if you would like to save your file. Click **Yes** if you want to save your changes. If you want to exit and not save any changes, click **No**. You can also click on **Cancel** and return to the Simple Update in FamilyInsight without saving or exiting.

If you entered FamilyInsight from the Tools menu in PAF, you will be returned to PAF when you exit. The file that will be open in PAF is the one that you started with. If you used **Save As** and want to use that database, you will need to open that file in PAF.



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 or if you synchronize records from the new **FamilySearch™** website, 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 them when you return to PAF because it does not have that feature. When you reopen FamilyInsight you will see the event notes.
- **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 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.
- **New** – Click to add a new event and/or person
- **Delete** – Click to 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.




Ordinance Status Icons

- Your file has completed ordinances in for this person.  
- You have synced this record with the new **FamilySearch™** website and there are ordinances that are ready to be done.  
- You need to sync relatives connected to this person in order for certain ordinances to be ready.  
- 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. **R** 

Synchronized Icons

- The two chain links symbolize the two databases; your record (on the LEFT) and 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 been changed or updated 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.

The symbols alert you to changes but you do NOT need resynchronize unless you WANT to. **NOTE:** Changing the spelling of a place name after you synchronize a record will trigger the left link to turn pink, therefore, it is *strongly* recommended that you use Edit Places to correct your places *before* you start synchronizing the records.

Window Arrangement

When you open the Simple Update mode, you will see the following windows:

- **Individual List** – Upper left quadrant of the screen. Displays the people in your file according to the [filter](#) you select.
- **Search Details** – Upper right quadrant of the screen. This will be a blank window until you begin a search. After starting a search, you will see your search status .
 - You may close the **Search Details** window by doing one of the following:
 - Click on the small black X in the upper right corner of the **Search Details** window.
 - Click on **View**, in the menu bar, and uncheck **Search Details**.
- **Details** – Lower part of screen. Blank until you click on a person in the **Individual List**.
 - The information on the left side of the window comes from your file.
 - Use the scroll bar on the far right of the Details window to see all the information.
 - The right side of the window remains empty until you search for a name and select a match for comparison.
 - The information on the right comes from the new **FamilySearch™** website.
 - If there are more than one spouse or set of parents, they are shown on tabs.
 - Click on the tab for the marriage you want to view or update with. This will bring that marriage or parent information to the top to view.
 - Choose Ignore if you do not want to Match or Add the marriage or any information
 - You must choose the "Match with spouse 1: John Doe" on the left or "Add" if you want to add any marriage information or children listed with that marriage

- on the right.
- You can match parents in the same way.
- You can also add parents with sealing to spouse information found in the ordinance section, by choosing "Add with Parents" from the sealing to parents dropdown.
- If you already have parents in your file for this person and want the sealing to parents information you should choose "Add to Parents..." or "Replace for Parents...".

If you cannot see one of these windows, click on **View**, in the **Menu** bar, and click **Arrange Windows**. This restores the default settings and the windows will appear.

For more details on the windows, icons, tools, menus etc., please read [Lesson 1: Getting Started](#).

Sort, Filter, and Find

Sort

The names in the **Individual List** window appear in **RIN** order.

- You can change the sort order by clicking on one of the column headings at the top of the window. You can also use the **Sort By** drop down menu under the Toolbar. Your choices are:
 - Status
 - Primary RIN
 - Primary Surname
 - Primary Given Name
 - Secondary Surname
 - Secondary Given Name
- After you have search results from FamilySearch™, you can also sort the list by FamilySearch™ name or % Match.

Find

Use the **Find** field to locate the information you need. **Find** is located on the Navigation toolbar above the names in the individual list.

- Click your cursor into the **Find** field and type the name, place, or RIN you need.
- The highlight goes to the first occurrence of your search criteria, 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 for a number.
- Click the **Find Next** button to jump to the next occurrence of the name or number.
- 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. **NOTE:** In the **Edit Places** mode, it 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

The default filter for the names you see on the **Individual List** is, **Needs Ordinances**. Those who do not need ordinances or do not [qualify](#) for the needed ordinance do not appear on this list. You can change which records appear on the list by choosing a different **Filter**. You will find the filter on the **Navigation Toolbar** along with **Sort** and **Find**. Click the dropdown arrow and choose from:

- **All Records** – Shows all records in your database.
- **Incomplete Dates or Places** – Displays all records that either have a missing/incomplete date or place. The computer will search birth/christening, death/burial, marriage, and all ordinance fields. If **LDS Options** are turned off in your database manager program, this option only searches for missing dates or places in the basic life events. This setting may be changed by going to your database program and changing the "Preferences" to show lds Data"Use LDS data".
- **Incomplete Ordinance Info (include unqualified)** – Shows all records that have a missing/incomplete date or place in an ordinance field.
- **Needs Ordinances** – Displays all people who need ordinances and are qualified for receiving the ordinance. If there is any notation in either the date or the temple field the computer considers the ordinance complete and may prevent the name from appearing on this list.
- **Cleared or Submitted** – Shows all records that have **Cleared**, **Submitted**, **Reserved**, or **In Process** in an ordinance field.
- **Incomplete Ordinance Info** – Shows all qualified records that have a missing or incomplete date or missing place in an ordinance field.
- **Incomplete Ordinance Dates** – Displays all qualified records that have either a missing or incomplete date in an ordinance field. It will not show individuals that have a date but are missing the place. An Incomplete date is one that does not have a day, month and a year.
- **Incomplete Individual Ordinances Info** – Displays all qualified records that have missing/incomplete dates or places in the LDS individual ordinance fields
- **Incomplete Individual Ordinances Dates** – Shows all qualified records that have missing/incomplete dates in the LDS individual ordinance fields
- **Incomplete Sealing to Spouse Info** – Shows all qualified records that have missing/incomplete dates or places in the LDS sealed to spouse ordinance field.
- **Incomplete Sealing to Spouse Dates** – Displays all qualified records that have missing/incomplete dates in the LDS sealing to spouse ordinance field.

NOTE: If **LDS Options** is turned off in your preferences of your program, the default filter in FamilyInsight is **Incomplete Dates or Places**.

Qualified Individuals

The **Needs Ordinances** list will only include people who meet the minimum standard for a TempleReady™ submission.

- **For Baptism and Endowment** – They must have a name, sex, and a date and place for a life event, such as birth/christening or death/burial.
- **For Sealed to Parents** – They must have the same information as for Baptism and Endowment plus at least a first or last name of a father.
- **For Sealed to Spouse** – They must have a marriage date and place. We require a name for both husband and wife and they must each qualify for personal ordinances. This follows guidelines,

suggested on Temple cards, which is to have individual ordinances completed before the marriage sealing is done.

Preferences

- From the menu bar, click **Edit**, then **Preferences**. ***Macintosh Users** – From the Menu bar, click **FamilyInsight**, then **Preferences**.

FamilySearch™ tab – Contains options for both the Search IGI and the Full Synchronization modes.

- FamilySearch™ (These three options only pertain to the Full Synchronization mode)
 - **Add FamilySearch™ ID as Custom ID** – Adds the the new **FamilySearch™** website person identifier number to your records in the "Custom ID" field.
 - **Add FamilySearch™ ID, but not as Custom ID** – Adds the new **FamilySearch™** website person identifier number to your records in the "Other Events" section of your "Edit Individual" screen. The custom heading is "FamilySearch Id". This is the default setting in FamilyInsight.
 - **Ignore FamilySearch ID** – No Person Identifier will be added visibly to your file but the PID will show in FamilyInsight by the name.
- International Genealogical Index (IGI)
 - **Options for IGI searching and sources** – Default set to "Leave most recent IGI Search source only".
 - **Options for search cache** – Default set to 2 days.
 - **Clear cache button** – Clears the cached (stored) IGI searches and forces the program to check the IGI again rather than load the cached search results from a previous search.
NOTE: We can no longer store your **FamilySearch™** username and password therefore, we removed it from the Preference window.
- **Default setting for new spouse or parents from IGI or FamilySearch™** – Choose to either **Add** or **Ignore** depending upon your personal preferences. You may override either option as desired. Default is **Ignore**.

To learn more about other menu and Toolbar options, please read [Lesson 1: Getting Started](#).

Add New People and Events

While in FamilyInsight, you can add a relative (mother, father, spouse or child) to the person you have selected. You can also add new events (birth, christening, death, burial or other events) without returning to your database manager. To learn how to do this, please refer to [Lesson 1: Getting Started](#) under the subheadings **Add New Individuals** and **Add New Vital or Other Events Information**.

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