

Synchronize Two Databases Using FamilyInsight (Compare and Sync mode)

Topics covered in this lesson:

- [Overview](#)
- [Opening Two Files](#)
- [Window Arrangement](#)
- [Sort, Find and Filter](#)
- [Synchronizing Records](#)
 - [Sources and Notes](#)
- [Add New People from the Secondary File](#)
- [Add New People and Events](#)
- [Quick Guide](#)

Overview

Compare and Sync allows you to examine two separate files and copy information from one file into the other file. It is a wonderful tool for comparing and transferring information from a secondary file into your regular file. It is especially nice for adding records from a GEDCOM file into your main file. Before starting, you should make a backup copy of your file.

For step-by-step guidance, click the **Guide Me** button in the **Toolbar**. The instructions change depending upon what actions you have already performed and/or which person is selected.

Opening Two Files

Begin by either opening FamilyInsight from the Tools menu of PAF 5 or by double clicking on the desktop icon. If you open from the desktop icon, you must find the file you want for your Primary file. (To learn more about opening FamilyInsight and the files you can use, see the **Getting Started** lesson section called, **Opening from PAF** and/or **Opening from the Desktop Icon**.) This file will **receive information** from the file you open next.

From the **How would you like to start?** menu, choose **Compare and Sync**. Next, choose a second file from the "Open a file..." window. It may be a PAF 5, GEDCOM, Ancestral Quest, Family Tree Maker 2010 or 2011, or back up from any of these programs.

Window Arrangement

FamilyInsight opens with the names of the two databases displayed on the title bar at the top of the FamilyInsight screen. The first file listed is the **Primary file** (opened first) and the second file listed is the **Secondary file** (opened second).

The **Individuals List** window shows all records with differences. Records with identical information

do not need updating so they do not appear on the list. Records of people who may be a match appear side by side. When you see a name in the **Primary name** column with no name in the **Secondary name** column, you know they only exist in the Primary file. People who only appear in the Secondary name column will not have anyone next to them in the Primary name column.

You can compare the data in both files and synchronize (extract) information from the Secondary file, and add it to the Primary file. The Secondary file remains unaltered.

The **Pedigree** window can display either the Primary or the Secondary Pedigree. Click the tab at the bottom of the Pedigree window to switch between the two pedigrees. When you click on a pair of names, the details of their life events show in the **Details** window at the bottom of the screen. If you cannot see this or other windows, click on **View**, at the top of the screen, and select **Arrange Windows**. The screen returns to the default setting and restores lost windows. (To learn more, please read the **Getting Started** lesson section called **Windows Arrangement**.

Sort, Find and Filter

The Sort, Find and Filter options appear on the Navigation bar near the top of your FamilyInsight window. If you cannot see these options, click on View, in the Menu bar, and hover your mouse over **Toolbars** and select **Navigation Tool** bar.

Sort

Individuals are listed by the Primary RIN when the program opens. You can change the sort order by clicking on one of the six column headings at the top of the Names List. The columns headings are Status, Primary RIN, Primary Name, Secondary RIN, Secondary Name and % Match.

You may also sort the list by selecting an option from the **Sort by** options list. Your **Sort by** options are Status, Primary RIN, Primary Surname, Primary Given Name, Secondary RIN, Secondary Surname, Secondary Given Name and % Match.

Find

- To find a specific name or RIN, click your cursor into the Find field and type the name or RIN you need.
- The highlight goes to the first occurrence of the name or RIN in the Individuals List window.
- Click the **Find Next** button to jump to the next occurrence.
- After moving to other entries, you may click on the **Find Previous** button to return to the previous entries that match your request.

You may type in a first, middle or last name. When you type a RIN, the highlight moves to that RIN in either the Primary or the Secondary name column. If the RIN happens to match a number in the % Match column, it finds that match, too!

Filter

Filters control what names appear on the Individual List. Click the **Filter** dropdown arrow and choose from:

- **All Differences** – Default setting for this mode. Shows all records with differences. Names that appear in both files and have identical information are not listed.

- **Changed or New Records** – Shows all records with differences. Names that only appear in the primary database are not listed because they cannot be added to or updated.
- **Right Side More Recent** – This option only shows records that were changed in the secondary database more recently than the primary database. Records that were changed more recently in the primary database will not be shown even if the corresponding record in the secondary database was changed since the files were last synchronized. Use this filter when you know one file was updated after the other and you want that information transferred.

Synchronizing Records

You are now ready to update your primary database with information from the secondary database. After highlighting a pair of names in the Individuals List, compare their information in the **Details** window. Remember to examine all the information for each individual by scrolling down to the bottom of the **Details** screen.

Your file has the ability to store more than one set of dates and places for a person's birth, christening, marriage, death and burial. These additional life events appear in a section called **Other Events**. Therefore, if you find conflicting data, you do not have to choose to keep one set of information and lose the other. Once you select the information that you would like to add to the Primary record, choose how you want it added. Click the drop down arrow by the update options for each name or event.

Comparing Data

- Select the pair of individuals that you would like to synchronize. You can move through the list using the green **Up** and **Down** icons, the up and down arrow keys on your keyboard, or by clicking on an individual with your mouse.
- Compare the information in the **Details** window.
 - Differences are **highlighted in pink**.
 - When information appears in the Secondary file and the corresponding field in the Primary file is empty, the data is **highlighted in green**.
- You can also compare the people's pedigrees by clicking on the appropriate tab at the bottom of the **Pedigree** window.

If you have small arrows by any names in the pedigree, click on them to see other generations.

Begin the Updating Process

- Select the information you want to add to the Primary file by either putting a check in the box in front of the data or by changing the options shown on the far right. Your options are Merge, Add, Add as #1 (or other number), or Ignore.
- Data that is **highlighted in green** will be added automatically when you click the Update icon. You may change the default setting (Add) to Merge, Add as #1 (or other number), or Ignore by clicking on the dropdown arrow by the options box for each event.

Make sure you select the information you want to have added to your file when you click Update.

Selecting the information that you want included when you merge records has changed somewhat from previous versions of Insight. Information that is **highlighted in pink** can only be added by putting a check in the box. All other information that you want to merge into the Primary record (left) 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 Secondary record. 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 for the individual in 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 any information for this event.
- **Replace mine** – Replaces the selected information in your file with information from the **Secondary record**. Essentially, this is the same thing as Merge.

For Marriage events, first choose whether you want the marriage information from the Secondary record. From the drop down box underneath the marriage heading, choose from the following:

- **Match with MRIN # (Marriage RIN)** – This option is only available if the information is the same or very similar to the information in your file. This merges the Secondary information with the same MRIN # on the left when you merge your records.
- **Add** – Adds the marriage as a new marriage for the individual when you merge your records.
- **Ignore** – If you choose this option, no marriage information will be added to your file when you merge your records.

Next, decide how you want to transfer the actual marriage event data and/or the sealing information. Information **highlighted in pink** may be selected by putting a check in the box but you must still use the drop down box in front of the date and place fields, to choose from the following options:

- **Merge** – Merges any checked information from the right side with the information you have in your record on the left. You must check the information you want brought over into your primary record.
- **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 for the marriage.
- **Add as New** – Keeps your original information as the primary information and adds the new information under the **Other Events** section in your file for this marriage.
- **Ignore** – Choose this if you do not want to update any information for this marriage.

For Parent information, first decide whether you want the parent's information from the Secondary record to your file. The choices are:

- **Merge with MRIN # (Parents Marriage RIN)** – This merges the checked information with the information in your record for the corresponding family number.
- **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.

Carefully review each setting before you merge.

The merged information will appear in Primary individual's record, on the left. If you want to make other changes, you can edit the information while in FamilyInsight.

Sources and Notes

When the Primary and Secondary files have different source information for an event, the source icon (paper clip) is **highlighted in pink**. You can view a source by clicking on the source icon, next to the

event.

You can edit source information in the Primary file but not the secondary. Sources are added to the events that you update according to your [preference](#) settings. You can also choose to add the source for a specific event by checking **Add when Updating** in the source citation window. When you click **Update**, the source will be added to the event in your Primary database.

- There are two ways to transfer source information when you update people.
 - Set your preferences by clicking **Edit** and choosing **Preferences**. Click the **General** tab and put a check in the box by "**When selecting an event, select its source too**". **NOTE:** If you do not select an event for inclusion in the merge, any source information associated with that event will be lost unless you use the following option.
 - "Add when Updating" in the source citation window. You can view and edit a source by clicking on the source icon, next to the event, in the Primary record.
- When sources contain differences, the source icon will be **highlighted in pink**.
- If there are differences in the notes, the **Show Notes** button will be **highlighted in pink** and the **Notes Selection Box** will become active. You can view the text of the notes by clicking on the **Show Notes** button and the differences in text will be **highlighted in pink**.

From the Notes Selection Box you can choose:

- **Replace** – The notes on the left will be replaced with the notes on the right when merging.
- **Combine** – Combines the notes from both records. If there are common notes in both records they will not be duplicated; only the differences highlighted in pink will be combined.
- **Add as #1** – Adds the note from the right as a new, separate note to your file (on the left) in the first position.
- **Add as New** – Adds the note from the right as a new, separate note to your file (on the left) in the last position.
- **Ignore** – Ignores the notes on the right and does not change anything in the notes on the left.
- You may also choose to edit the notes on the left directly in the notes field.
- If there are only notes on one side, those notes will be kept by default. If there are notes on both sides, then Combine will be selected. If there are common notes in both records only the differences **highlighted in pink** will be added from the right to the left record.
- The modified notes will not be permanent until you save your work.
- When you change your records, "(modified)" appears by your file name in the Title bar. This disappears when you save your changes.

After selecting the information that you want added to your Primary file, click on the **Update** icon, or choose **Update** from the **Action** menu, or use the shortcut key, **Control + U**. The data now appears in the Primary file and you can see it in the left hand side of the **Details** window.

***Macintosh Users** – The Action menu found by right clicking on a name. The actions are also on the toolbar.

If there are additional changes you want to make, you can edit the information in your Primary record while in FamilyInsight.

Please remember, when you update a person and include the addition of new parents or spouse, they are added automatically. Children of the marriage and siblings are not added automatically.

This information is not saved in your database until you either click on **Save**, go to **File**, on the menu bar, and choose **Save** or **Save As**, or click **Yes** from the popup window when exiting.

Add New People from the Secondary File

For step-by-step guidance, click the **Guide Me** button in the Toolbar.

You can add people that only appear in the Secondary file to your Primary file. Click on the person you want to add then either click the **Add** icon, choose **Add** from the **Action** menu, or use the shortcut key **Control + D** to copy the data to your Primary file. The newly added person will be listed in the **Individuals List** with the word **Added** in the **Status** column.

If the program matches two individuals as possible duplicates but you decide that they are two separate individuals, you may click **ADD**. **CAUTION: Only click Add if they are not the same person, otherwise, you will add a duplicate person to your file.** If you proceed, the Secondary individual will be added as a new individual in the Primary database. The original record in the Primary database will not be changed in any way but you will not see them on the Individual List. The status column will display **Added** next to the added individual. The new person is assigned a RIN when you save your changes.

When you **add** individuals to your database, their relationship links will remain as long as the individuals involved are already in your database or they are added during synchronization. As stated previously, when marriage information is added, the children of that marriage are not added automatically. Parents and siblings of a newly added individual are not added automatically, either. To indicate that these individuals are only temporary, they have the notation, "***Mary/Smith/ (1750-?)-RIN) ** Not synced into main file". This means the **individual has not been added** to your database and you only see the name as a "placeholder". You must add them manually if you want them in your Primary database. If you do not add the spouse before saving your work, the marriage information will not be saved **unless** they have a child or children in your file. In this circumstance, only the date and place of the marriage will be saved but not the name of the spouse or any of their personal information.

It is easy to find the individuals that needs to be added. When you update a record, and see the notation, ****Not synced into main file**, do the following.

- Find their RIN number in the **Secondary** file, on the right.
- Make note of the RIN[s] and/or name[s].
- Either type the RIN or the name into the **Find** field and click **Find Next** until you find them or use the slide bar in the **Individuals List** window locate them on the list.
- Click on the name to select it, then click **Add**.

Whenever a record is **Updated** or **Added**, this is noted in the status column next to their name.

Changes are not saved in your database until you save your work. We suggest you save frequently by clicking the Save icon in the Tool bar. When you are finished synchronizing your databases, remember to Save or use Save As to rename the file or save in a new location before you exit FamilyInsight.

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 file. To learn how to do this, please refer to the **Getting Started** lesson under the subheadings **Add New Individuals** and **Add New Vital or Other Events Information**.

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**.

- Open Family Insight.
- Select Compare and Sync.
- Choose your Secondary file from the dialog box. Remember, the Secondary file gives information.
- Select a pair of names to compare.
- If they are the same person, select any information in the Secondary file that you want added to your Primary file.
 - Click UPDATE when the people that are paired together are the same.
 - Click ADD when the person in the Secondary file is NOT in the Primary file.
- Check updated records for any notations concerning people that are *****Not in Sync***** and add them if desired.
- Save your work frequently.

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