



Ohana Insights

Tips for using FamilyInsight and other tools

Ohana Software

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Preview of Coming Attractions

Since we started the *Ohana Insights* newsletter in March 2007, a few of you have asked us to start a blog. We have decided to take you up on your request. As we get this off the ground, the blog and the newsletter content may be one in the same but with time and experience we will no doubt evolve into a comfortable format that we hope will serve all of us well. Since I have always thought of my opening remarks as my opportunity to "blog", this should be an easy transition. So that you know what to expect, sometimes my blog may feel more like a "twitter" (an online message that is limited to 140 characters per "tweet") but at least I'll be able to post my thoughts more frequently for those that care to follow.

As I use words like twitter, tweet, and blog, I find myself smiling at the absurdity of how that must sound to some of you. The increased use of cell phones and the Internet has brought forth an entirely new world of communications and with it, a new vocabulary. Blog, vlog, and twitter are only a few of the new terms for describing how we use these technologies to our advantage. Here is another vocabulary word for you; **webinar: a web-based seminar**. We will begin offering training to family history consultants in the form of a webinar through family history centers. You will hear the trainer and watch the presentation over the Internet. Webinars have the ability for you to ask questions and participate in the discussion as though you, and all the other attendees, were in one room. After we gain experience by conducting the webinars for consultants, we plan to open them to anyone that wants to participate. Our last company meeting was a webinar and we really felt like we were all together in one room and not separated by mountains and oceans.

Attention Family History Center Directors, if you want to be contacted about a webinar for your consultants, please send an email to: webinars@ohanasoftware.com.

We are looking forward to using the the miraculous tools of today's technology to provide you with more opportunities to learn about FamilyInsight and related topic. Visit our website at www.ohanasoftware.com and look for a link to our blog.

One final note, are you, or someone you know, ready to start doing family history? Follow the **Twenty Minute Genealogist** on her new blog at <http://twentyminutegenealogist.blogspot.com/>. You and Andrea can walk the path together and find out just how much you can accomplish in 20 minutes.

~ Cina Johnson ~

Insights into Insight: Quietening your Synchronizing Concerns

Sometimes we get emails or calls from customers who are leery about synchronizing their files with the FamilySearch family tree. They do not fully understand the process and are concerned that the process will force data into their files that they do not want. I think this is interesting because those questions never arose when people started searching for records in the IGI. Simply because you CAN add information from the FamilySearch family tree does not mean you HAVE to. The Synchronize mode gives you the same options and control as you have in the Search IGI mode. If you do not want the information, you do not need to add it.

For those of you who are only interested in looking for ordinance, you will be happy to hear that within the next few weeks we will release a new version of FamilyInsight that will provide you with a new mode with the look and feel of the Search IGI mode. You can use this mode to search for ordinances within the **FamilySearch** family tree without the additional synchronizing features. We hope you will find this new flexibility helpful.

Perhaps you have hesitated to use the Synchronize mode due to other uncertainties. I hope these questions and answers will put your mind at ease so that you will begin to take advantage FamilyInsight's ability to synchronize records.

~ Can I go back and forth between PAF Insight and FamilyInsight? ~

FamilyInsight has all the same modes (functions) as PAF Insight so there is no need to return to the PAF Insight program after updating to FamilyInsight. You can use both but we recommend that once you update you stick with FamilyInsight.

This background information should give you some greater insight. FamilyInsight has features that did not exist in PAF Insight. It can store information that PAF Insight does not even see or save. Therefore, if you use FamilyInsight to **synchronize** your records with the **FamilySearch** family tree, you should not use that file in the PAF Insight program.

~ When I add information from my file to the FamilySearch family tree, how will my data be treated? ~

Any data you send to the **FamilySearch** family tree through FamilyInsight will have your name attached as the contributor just as it would if you manually entered the the information on the **FamilySearch** family tree website. You will be able to modify or delete anything you have added. Others will see you as the contributor and they will be able to contact you so you can collaborate on research.

~ If I choose to synchronize information, what data will be overwritten? ~

Since the synchronization process is two way, this requires two answers.

No data is overwritten in the **FamilySearch** family tree. If you add something from your file to **FamilySearch**, it is added to the record without overwriting the existing data. This allows others to see all assertions and decide for themselves what they think is correct.

If you **choose** to add information from the **FamilySearch** family tree to your file, you have options on **how** it should be added. Next to each line of information (I.E., the person's name, birth, death, etc.) there is an options setting which you can change by clicking on the drop down arrow. If you select Merge, only that specific piece of data from **FamilySearch** will be added to your file when you click synchronize. Merge will replace what you had in your file. In the case of a birth date and place, you may have the same birth date but not a complete place. If the FamilySearch record contains the complete place, you will select Merge and **choose** the complete birth place to replace yours.

There are other options, too. You may find a record with a different birth date and place. If you want to keep your information and also have the birth information from **FamilySearch**, click the drop down arrow and select **Add** or **Add as New**. This will allow you to have two sets of birth information. This is exactly as it worked in PAF Insight with the Search IGI mode. Of course, you can set the option to **IGNORE** so that data will not go into your file.

~ How correct is the information in the FamilySearch family tree? Do I have to accept that data and put it into my file? ~

Like any database on any website or any file sent to you by any other researcher, the data on the **FamilySearch** family tree is only as good as the researcher(s) that provided the information. I would not automatically discount the information but neither would I automatically trust it. You can study the information to see if it looks valid or suspect.

NOTE: If a record from **FamilySearch** appears to have vastly different information within the records, your person may have been combined improperly with another person. The data for each person may be perfect but because they are combined wrong, it makes everything look false. Use the Separate feature within FamilyInsight to look at the data in greater detail and separate any individuals that should not have been combined with your person.

Once you have marked any duplicate records as a Match, you may select the specific data that you want transferred into your file. If you do not want to transfer any data, make sure everything is set to **IGNORE** before you click **Synchronize**. You should still click **Synchronize** so **FamilySearch** will combine the records you marked as a Match. It also marks your records so you know they have been synchronized.

~ Some of my ancestor's records still need to be combined with other records but the system will not allow it. Is there something that I can do? ~

When you are looking at possible matches of someone in your file, mark all matching records as a Match. After marking the matches, click on the line that says **Ready to Sync**. Select the information that you want to synchronize (transfer from one file to the other). When you click the **Synchronize** button the these smaller records should be combined and the records that are too large to combine will be left untouched. You will get a message concerning those that could not be combined. Even if you cannot combine all the records, at least the smaller ones should get combined. This can be likened to outgrowing one file folder in your paper files and creating a second folder for the records.

~ How long does the sync process take? ~

If you have limited time, you will be able to use the new, simplified method to search for ordinances, that will become available in a few weeks. This will **not** update the **FamilySearch** family tree, combine records or help with that clean up process but you will be able to find the ordinances and add them to your file.

Hopefully, everyone with access to the **FamilySearch** family tree will help with cleaning up their branch of the tree. If we all take the time to help search for and combine the duplicate records of our ancestors, the tree will become better. If we all take the time to help search for and combine the duplicate records of our ancestors, the tree will become better. If we all take time to thoughtfully review our ancestor's records and add notes (and someday add sources) to their file, everyone will be able to evaluate the validity of the data and the file will become more valuable. If we will claim our legacy contributions and provide some contact information so others can contact us, the collaborative efforts of researching will break down brick walls resulting in an explosion in the work. To me, that will be well worth the time it may take to synchronize records and clean up the system.

There is no way to tell how long any particular search will take nor is there any way to tell how many possible matches there maybe be. These variables mean that some people can be synced in a couple of minutes while others may take considerably longer. We recommend that you start with one family and synchronize that family, then work on another family. The proverbial elephant will be eaten, one bite or family at a time. If you are actively working on a specific family, you may want to synchronize those records first. If you want to prepare certain names to temple work, synchronize those. The system will track what you have synced by placing the chain-link icon by each name.

~ How can I learn to synchronize my records? ~

The basic steps of synchronizing are shown on the training video. Please go to our website at www.ohanasoftware.com and click on the link to **Watch the Videos**.

You can also get the basic steps from **Lesson 9: Synchronizing your file with FamilySearch family tree**. The end of the lesson there is a section called **Quick Guide** with just the very basic steps. Use the **Guide Me** button within the program to get additional help.

~ What advice can you give to make the sync process easier? ~

I am being redundant but here it is again.

1. Before you even think about using the Synchronize mode, watch the **Edit Places** video and/or read the Lesson then use the **Edit Places** mode to make sure your place names are recognized by **FamilySearch**. Doing this first makes the synchronizing process easier and there will be fewer interruptions.
2. After you have finished cleaning your places, watch the videos for Synchronizing records and Separating records. You can also read the Synchronize lesson. Once you have done that, you will be ready to use the Synchronize mode.
3. Use the Guide Me button to get help as you work through the process.
4. Take your time and don't rush. Family History is about "the one" and turning our hearts not about speed or numbers
5. And of course, enjoy yourself!

Spotlight on: Generation Maps

People that are lucky enough to live in an area where they can attend a genealogy conference, such as the ones sponsored by BYU or FamilyHistoryExpos.com not only have the fun of attending classes but they also shop! At any of these conferences, you would undoubtedly visit is the **Generation Maps** booth and talk to Janet Hovorka. The next best thing is to visit our website and take the link to Generation Maps so you can shop online. Just go to www.ohanasoftware.com and click **Links** under the **Community** heading to find the **Generation Maps** link. You may also go directly to **Generations Map** at: <http://www.generationmaps.com/php/index.php?NewInvoice=Yes&genmapid=ohana1041012>

Need the perfect gift or wall decor to proclaim you love of family and family history? Consider a stunning display of your family history or a beautiful archival-quality photographic reproduction on artist grade canvas. **Generation Maps** offers dozens of preset decorative charts which you can customize by selecting the paper, color and embellishments. If you have your own vision, Generation Maps will create a custom piece just for you. Custom charts can be up to 42 inches wide and three feet long, you have great latitude for your creativity. The charts are printed with archival quality pigment inks and papers.

If you need something more practical, that is available, too. Generation Maps can print forms or charts to help you with your research and you can also order blank charts and forms.

Whether you are looking for something practical like a their unique "generation map" to help you with your research or a stunning display for you home or as a gift, Generation Maps is worth a visit. To find this and other links from our websites, go to the **Community** heading on our website and select **Links**. You can see all the products and services that we admire and think you will enjoy.

Quick Tip – New Button: View/Change Summary

After you Synchronize your records with the FamilySearch family tree, you will see a new button appear on the FamilySearch side (right side). The button says, **View/Change Summary**. When you click this button, a Summary window appears. This relates to the **Summary View** in the **FamilySearch** family tree and allows you to set the way you think the data should appear for that person. When there is only one choice (one name or one birth date) the data is grayed out. If there are multiple choices for a name or date, the option is active and you can click on the drop down arrow and choose which of the assertions you feel are the most correct.

When you reserve names for temple work and print a FOR (Family Ordinance Request), the cards are printed with information from the Summary View! A few weeks ago, I combined records for an ancestor in preparation for submitting his name for temple work. When the cards were printed, I was surprised that his card was printed with the name "Anthony/ /" but no last name. When I looked at the **Summary View** of the FamilySearch record, it was set with Anthony. Had I taken the time to click the **View/Change Summary** button, I would have chose the more correct name of Anton Limbach instead of the Americanized name of Anthony without any last name.

My advice is, when you synchronize a name, take the time to click the **View/Change Summary** button and select the view you want for the records. It will save you time when you are ready to reserve names and print the FOR.

Odds and Ends

The current version of FamilyInsight is 2009.3.21.0.

Attention Family History Centers

Please **uninstall** PAF Insight from your center computers and **install FamilyInsight**. You may either download the program from our website or get it from LanDesk.

Which Program Should I Use?

FamilyInsight is the new **name** for the PAF Insight program. All updates to the Insight program are in the FamilyInsight name. If you live in a temple district that still uses Temple Ready, you may either update to FamilyInsight or continue using PAF Insight. If you choose to update to FamilyInsight, you will be able to use it just as you use PAF Insight and when you gain access to the **FamilySearch** family tree, you will be able to use the new mode for Synchronizing with that system. In the mean time, you can take advantage of the updates to the program and learn the new way of selecting information that you wish to update into your file.

Please note that once you begin using FamilyInsight, it is advisable to cease using PAF Insight. (See the Insight article above for more details.)

Calendar

May 9th, 2009

Logan, Utah FamilyHistory Expo 2009

Eccles Conference Center

5005 Old Main Hill

Utah State University

Logan, Utah

Drop by the Ohana Software booth and say hello!

[Click here](#) for more information.

June 12th-13th, 2009

Colorado FamilyHistory Expo 2009

Embassy Suites and Conference Center

4705 Clydesdale Parkway

Loveland, Colorado 80538

Drop by the Ohana Software booth and say hello!

[Click here](#) for more information.

July 28th-31st, 2009

41st Annual BYU Conference on Family History and Genealogy

BYU Conference Center

770 E University Parkway

Provo, Utah 84602-1522

FamilyInsight demo Thursday the 31st, 5:15-6:15pm

[Click here for more info.](#)

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