



Ohana Software

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In this issue:

- [Back to Basics](#)
- [Insights into Insight: Frequently Asked Questions](#)
- [Spotlight on: Documenting your Work – Sources](#)
- [New Product: Charting Companion for FamilySearch by Progeny Software](#)
- [Odds and Ends – Spanish and Swedish Translation Volunteers Needed!](#)

Back to Basics

I generally listen to a morning news program as I start my day and I listen to the evening news while I fix supper. As the economic news worsens the broadcasts often include segments on how to live within our means. The advice generally boils down to getting back to basics.

Perhaps *Ohana Insight* should also present some "back to basics" training. We might all benefit from stepping back to evaluate our personal goals and abilities and from implementing a course correction if needed. We each have seasons in our lives; a time to learn, a time to gather, a time to research, a time to write our personal history or the history of our ancestors, and times to source, index, clean up, organize, preserve, collaborate, or teach. Our families, jobs, callings, and health all influence the seasons of our lives and when one door closes, look around because another door may be opening.

This month's Spotlight article is on sources. If you find that it is time to redirect your family history efforts, perhaps it is time to document your work. If you have run into a brick wall, I suggest you source what you have, it may be key to breaking down the brick wall. Sources are fundamental to quality genealogy records and I think, a fitting start to getting back to basics.

~ Cina Johnson ~

Insights into Insight: Frequently Asked Questions

Before I dive into questions and answers, I would like to make you aware of one feature of our lessons that are helpful for ALL USERS. The end of each lesson has a **Quick Guide**. This gives only the most basic steps for using that particular mode. No details. No long explanations. Simply instructions like, click on a name, click search, select a pair of names and compare their details, etc. The **Quick Guides** are available for all the modes. Copies of our lessons are available online under the Support heading.

Now for the Q and A. The number one question we hear is,

~ Do I need to update from PAF Insight to FamilyInsight? ~

OR

~ When should I update from PAF Insight to FamilyInsight? ~

If you have access to **FamilySearch** family tree, you should update to FamilyInsight and take advantage of the Synchronize mode. **The CURRENT version of FamilyInsight is 2009.2.16.0** (Released on Monday.) If you are using **FamilyInsight**, please make sure this is the version you are using. You may check for the version by opening FamilyInsight, clicking **Help** and selecting **About FamilyInsight**. The version number appears on the lower right corner above the **OK** and **License and Copyright** buttons.

PAF Insight users may continue using that program or they may update to FamilyInsight whenever they please but some may need to get the update license in order to install FamilyInsight. Everyone can use FamilyInsight to Edit RINs and Pedigrees, Merge, Edit Places, Search the IGI and Compare and Sync two separate files BUT only those people with a login for the <https://new.familysearch.org> website, will be able to use the Synchronize mode. To learn about the new features, please read "Insights into Insight: The Latest and Greatest Updates" in [Issue 23 of Ohana Insights](#).

The following questions and answers are not in any particular order.

~ What is the decision that I need to make when I see "Decision Need" or "Decision Optional"?

...and the companion question

~ Do I mark all the matching records or only the one I want to synchronize with?

~

After selecting a name and clicking Search, you may get a number of possible matches, just as you do in the Search IGI mode. Some of the records are marked "Decision Needed" and others are marked "Decision Optional". The decision you are making is to the underlying question, "Is the person I see in FamilySearch the same person as I searched for?" If the FamilySearch person is the same person as the one in your file, click "Match". If they are not the same person, click "Not a Match". This process prepares the matching records to be combined by FamilySearch family tree as part of your "clean up" efforts.

Records marked, "Decision Needed" must be marked as either a match or not a match. "Decision Optional" records should be viewed to see if they are a matches but you only need to mark matching records. If they are not a match, you do not need to click "Not A Match".

HINT: When I am reviewing a long list of possible matches, I do find it helpful to mark all the records simply so I know that I have looked at all of them.

After reviewing all the records, click on the row that says, **Ready to Sync** and begin the process of selecting what information you want to transfer from your file to **FamilySearch** and from **FamilySearch** to your file. You do not need to transfer any information between files but you should review all the data before you click **Synchronize**.

IMPORTANT: Even if you do not select any information to transfer, you should click the Synchronize button. This tells **FamilySearch** family tree to combine the records and

marks your records as synchronized.

~ When I upgrade to FamilyInsight, what should I do first? ~

If you have not used PAF Insight to merge duplicate records and identify unlinked people and pedigrees, do that. The next step is particularly important for those who have access the **FamilySearch** family tree. Go to our website at www.ohanasoftware.com click on the Watch the Video link and watch the Edit Places video FIRST. After you watch the video, you should open FamilyInsight and choose the **Edit Places** mode and verify that **FamilySearch** recognizes all your places. Use the **Guide Me** button, read the lesson and/or watch the video again if you have questions about using this mode.

The time you take to verify your places before you start the synchronize process will save you time in the long run and make the overall synchronizing process easier.

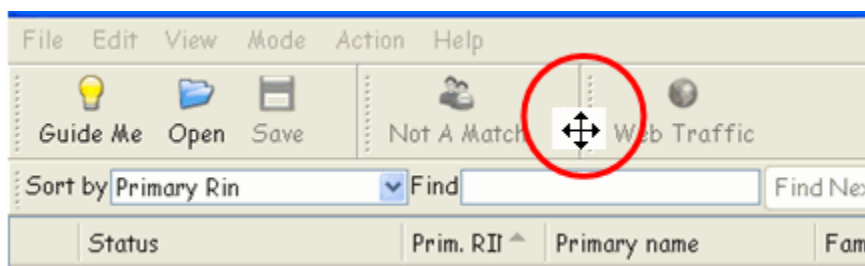
When you finish editing places, return to our website and watch the video for synchronizing your records with the **FamilySearch** family tree. You may also want to watch the video about separating records. After watching the videos and becoming familiarized with the process, you can open FamilyInsight and begin using the **Synchronize** mode. If you forget what you should do, click **Guide Me** and follow the instructions.

While I am on the subject of watching the video, reading the lessons and using **Guide Me**, a user said this concerning the lessons, "I would suggest that in your next email to customers that you recommend that they download [\[the lessons\]](#) and read them." I hope you will follow a fellow user's advice.

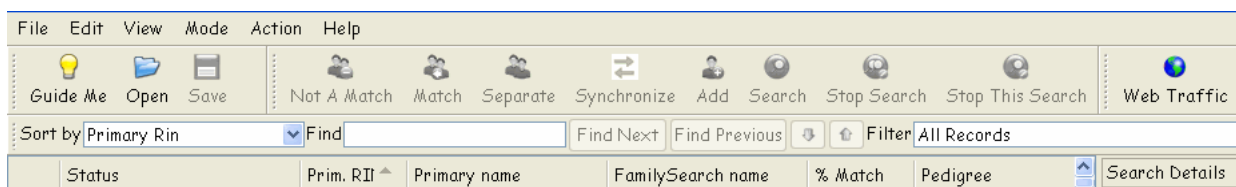
The final question and answer of the day is,

~ I cannot find the Search button (or some other icon). I can only start the search from the Action menu ~

The missing icons are hidden but you can easily uncover them by clicking on **View** and selecting **Arrange Windows**. If that does not work, put your cursor on the double bar (a dotted and solid line) to the left of the Web Traffic icon. See illustration.



When you cursor becomes a 4-headed arrow, click, drag it to the right to uncover the icons and release the click. You should not have this problem again.



Spotlight on: Documenting your Work – Sources

The first step in compiling a genealogy is to start with yourself and record what you know and provide a source for each life event you enter. Next, record the information and source of your immediate family; your spouse and children, and your parents and siblings. For a beginner, entering sources is easy but most of you are probably well beyond that phase, so you shudder at the thought of documenting all 2,500 or 56,000 or 289,000 names in your file. With empathy in my heart, my reply is the old mantra, "Genealogy without sources is mythology."

Personally, I am not impressed by the size of your file or the number of generations you have if you cannot show me sources. And remember, the Ancestral File and Pedigree Resource File are NOT sources and neither is "Aunt Jennie" if Aunt Jennie lived long after the people she researched. She may have found an original document to substantiate her work but what was it? How did she or you or anyone else know that 22 June 1753 is someone's birth, marriage or death date? Did the information come from a family bible? A baptismal record? Was the date provided on a pension application or mention it in a diary or letter? Those primary or secondary sources are what you need to add.

There is much to gain by sourcing your records, whether you started from scratch or received a file which has been handed down for several generations. When people provide sources, they look deeply at the information surrounding a person's life and begin to know them and appreciate their life and what they experienced. Hearts are turned and the gathering process changes from an issue of numbers and bragging rights to knowing, understanding and loving their family.

When you source your work, you not only validate your work but sometimes you discover problems with long held but erroneous conclusions. None of us are infallible so mistakes may creep in and suddenly we are linked to the wrong family. If you work to source each generation to the next, you may find errors, then discover the truth, and eventually link the family together properly.

Gathering and reviewing every document you have for a particular person or family and entering this into your file with the source, often leads to what I call, "Ah HA!" moments – joyful moments of enlightenment and discovery. Connections that have eluded you in the past may suddenly become clear. New theories may present themselves or the spirit may whisper and bring inspiration concerning a dead-end line.

For those whose genealogy experience has been confined to gathering records from others, the process of sourcing will introduce you to the wonderful world of researching. You will learn the basics of researching by sourcing yourself and your close relatives. You can learn how to find census records that show your family in one moment in time. There is something magical about seeing their names on a page surrounded by neighbors and other family members. You may discover grandparents living next door or down the street. You may see neighbors that you have heard stories about because the families were good friends. When you see your ancestors within their community they live within your heart.

Sourcing your records leaves your posterity with a valuable legacy of factual records. Once your records are sourced and shared, others can move forward with a firm foundation. I try to practice what I preach. When I add new data, I source it. I am also SLOWLY going through every document I have collected over the past 20 years verifying that it has been entered and sourced properly. At the rate I am working, it may take me 20 years but it has already been worth the effort.

New Product: Charting Companion for FamilySearch by Progeny Software

If you believe, as I do, that a picture is worth a thousand words, then you probably love charts because they help you visualize your family in new ways. Pedigree charts are a map to your extended family. Descendant Charts reveal the breath of an ancestor's posterity. Family Group Records focus your attention on a nuclear family. Color may be used to demarcate one generation from another or one family line from another. The possibilities are endless and Progeny Software's newest release, *Charting Companion for FamilySearch* brings its vast charting resources to the **FamilySearch** family tree.

If you use *PAF Companion*, then you already know how to use *Charting Companion for FamilySearch*. This certified program allows you to sign onto **FamilySearch** family tree and print charts or books from your records on that website. You can use the charts to track your synchronizing projects, create a family history and share everything with your family.

To use the program, you must be able to log onto **FamilySearch** family tree. After logging on, your records are available for you to browse, add photos, print and save. If you choose to add photos, they are NOT uploaded to FamilySearch but are linked from your digital photos to charting companion so that each time you open Charting Companion and log into **FamilySearch**, the photos appear. You can print your charts with the photos you have linked.

To learn more about Charting Companion for FamilySearch, visit our website at: <http://tinyurl.com/aumzw4>

To purchase Charting Companion for FamilySearch, [click here](#).

Odd and Ends

Spanish and Swedish Translation Volunteers Needed!

If you are interested in joining either the Spanish or Swedish translation teams, please send an email to: translate@ohanasoftware.com or fill out the form at: <http://www.ohanasoftware.com/?sec=international>

Calendar

St. George Family History Expo 2009

February 27-28, 2009
The Dixie Center - 1835 Convention Center Drive
St. George, Utah
[Click here for more details.](#)

February 28, 2009

19th Annual Heritage Faire 2009

3410 Church Creek Road
Redding, California
For information contact: (530)222-4949
Class and Registration Information: [Click Here](#)
Registration at 7:45 A.M., Classes 8:30 A.M. to 4:00 P.M.
The fee for this event is \$10 which covers registration materials, handouts from each class

attended, and as always, a great hot lunch!

South Davis Family History Fair 2009

March 7th, 2009

Classes 8:0am-4:30pm

FamilyInsight class taught by Diana Olsen

Bountiful High School

695 South Orchard Drive; Bountiful, UT

Conference on Computerized Family History and Genealogy

Theme: Building a Lasting Legacy

Friday and Saturday, March 13 and 14, 2009

BYU Conference Center

770 E University Parkway

Provo, Utah 84602-1522

[Click here for more details.](#)

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