Ohana Software March 2009 / Issue 25

In this issue:

- Twenty Five and Counting
- Insights into Insight: Using the New Features
- Spotlight on: Use the Tools
- Heritage Collector Suite Updated – Special Offer for New Buyers
- Odds and Ends

Twenty Five and Counting

This is issue number twenty five so we are beginning our third year of *Ohana Insights*. When John first broached the subject of creating a newsletter, I was excited and nervous. Talking comes easily to me and I love teaching but writing has never been my forte. My most pressing concern for this venture, was and remains, coming up with ideas that you will find helpful and/or interesting. So far, my idea list stays about one month ahead of the newsletters so I guess that means we can look forward to a few more issues!

This issue has a smattering of everything. The Odds and Ends section is full of reminders and tidbits that need frequent reviewing so please don't skip over that section. The Insights article has nothing to do with synchronizing records so EVERYONE can feel included. The Spotlight continues the idea of back to basics, this time with our software.

The only thing left to say here is, thank you for your continued support of Ohana Software and FamilyInsight.

~ Cina Johnson ~

Insights into Insight: Using the New Features

The more I use FamilyInsight the more excited I get about two of the new features. As I "showed" them to a customer last week, he said, "Insight is now a mini-PAF". I thought that was as good an explanation of its additional power as any. So, what does that mean? It means that there is almost no need to return to PAF because you can see and do almost everything you need to from within FamilyInsight.

From the start, PAF Insight displayed the primary and secondary pedigrees to assist you in identifying where each individual fit into your family tree. Beginning with with 2006 version of the program, you could edit information from within the **Details** window (at the bottom of your screen). Until now, if you wanted to see more of the details for the spouse, children, parents or siblings of the person you were searching for, you had to return to PAF. If you were in the Edit RINs and Pedigrees mode, and found an unlinked person or pedigree and knew how they should be linked into your main pedigree, you had to return to PAF to link them. Those days are over!

To see more information about family members within FamilyInsight, you only need to look as far as the **Details** window. Click on the name of your person's spouse and a window with their details appears. Click on your person's mother or father and their details window pops up. If you click on the Show Child (Show Children) button and click on a child's name, their details will be visible. You can do this for records on both the right and the left side and in all the modes.

Don't forget, you can still have access to the pedigree window, too. Just go to **View**, in the **Menu** bar, and make sure there is a check by **Primary Pedigree** and a check by **Secondary Pedigree** if you want that, too. If there is no check, click the option and you will now see the pedigree or the tab for the pedigree. It is usually in the upper right window. ' The IGI does not have a "pedigree" so you may not want that option in the Search IGI mode.

The process of linking people from within FamilyInsight works the same as in PAF. If the parents and the child are in your file but they are not linked to one another, you need to link them. Select one of the people (such as the father) and connect them to the other person (the child). When you find unlinked people and know how they fit into your file, write down their name and RIN. I will use an example of connecting a child to their parents but it works the same way for a husband and wife. The details are as follows:

- To link a child to their parents, simply click on the father's name in the name list of FamilyInsight. **NOTE:** This is available in all modes.
- Look at his information in the **Details** window.
- You may add a child by either clicking the **Show Children** (Show Child) button then clicking the **Add Child** button OR by clicking the button that says, **New**, hovering your mouse over the word **Relative** and selecting **Child**.
- Both options bring up a window with three options; **Link to an existing person** (meaning someone that already exists in your file), **Add new person** (because they are not in your file and you want to manually add them), or **Cancel**. Since you know the child is in your file (hopefully you wrote down their name and RIN), choose the first option, **Link to existing person**.
- A new individual list opens with your names listed in RIN order.
- Click your mouse into the **Find** field and enter the RIN or the last name, first name (don't forget to put a comma after the surname). The cursor will jump to that person's name.
- To ensure you have the correct person, you may click the **Details** button at the bottom of the screen. Close the window after reviewing their details.
- Click **OK** to close the **Details** window then click **OK** to confirm that you have found the correct child and want him or her linked to the father.

The child is now linked to his father (and mother) and you can save your work. That's all there is to it. Are you as excited about these features as I am, now?

Spotlight on: Use the Tools

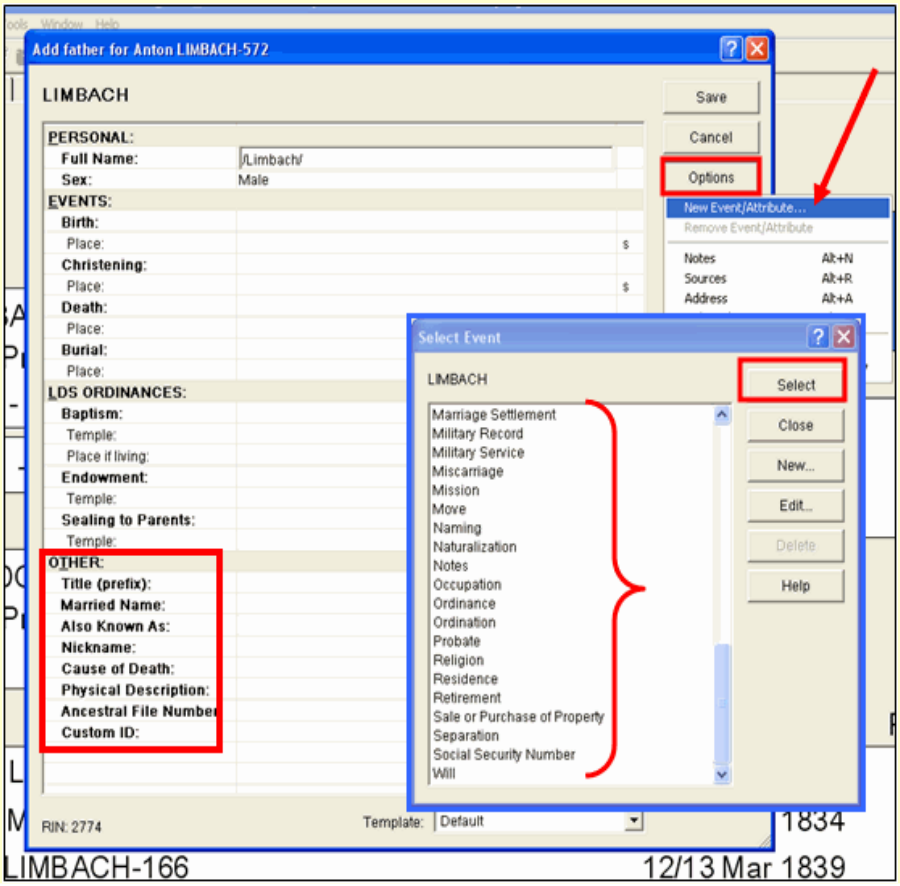
Lets face it, most of us enjoy hunting for our ancestors far more than putting our findings into our PAF or other genealogy program. However, recording our findings is an essential part of the process. It helps us closely examine the new information in context with our previous research and determine further research goals. Electronic records makes it easy to share our records with others and provide temple ordinances for our ancestors. Since we are blessed with the tools to make sharing data easy, we should learn to use the tools well.

Computers and the programs we use are far more than an expensive replacement for a typewriter. In our case, genealogy programs manage data. You can enter the information once then use the program's

features to compile charts and reports, compare data, search the IGI and/or the FamilySearch family tree, write books and enumerable other things. If you add parenthetical notes such as (twin) or (bricklayer) by a person's name, that shows up on temple cards and any other place where the person's name appears. Since that information may not be wanted or appropriate, PAF provides you with special fields for entering these notations. Just remember, a place for everything and everything in its place.

Computers also like consistency. How you enter your data affects the end results. SLC, Salt Lake and Salt Lake City may all be the same place to us, but to a computer, they are three unique entries. If you were to use the Focus Filter feature of PAF to identify everyone born in Salt Lake City, you would have to create a more complex and properly worded search to find everyone, including those whose records were entered as Salt Lake or SLC, than you would if you had been consistent in your data entry. The Edit Places mode of FamilyInsight not only helps you find the variations in your place names so that you can correct them but it will make the records you add to the FamilySearch family tree consistent with the current standards.

The standardization for data entry has been evolving since family history became popular in the 1800's and it will continue but many of us have ignored the request to change and continued to enter our data with outdated methods and inadvertently diminish the usefulness of our electronic records. PAF helps us comply with the the newer standards by providing a place for titles (Dr., Rev.,), married name (Mrs. Alfred Brown), nicknames (Betty, Lizzy), also known as [names] (alternate spellings of a person's name), cause of death, physical description (twin, coloring, height/weight), and custom ID (a unique ID number **or a symbol to designate specific family lines**). (See the left side of the screen shot under the heading "OTHER" and look for the **Quick Tip** at the end of this article to learn more). Additionally, if you click on the **Options** button of the Edit Individual page, and select **New Events/Attributes,** you have dozens of other options for entering data so that it is readily available instead of within a note or source. (See the right side of the screen shot)



Read *A Member's Guide to Temple and Family History Work* to learn how you should enter names, dates, and places to comply with current standards. Get to know PAF and use all its features to create a records of your family that follows the guidelines and is worthy of respect. Use the clean–up features of FamilyInsight before you search the IGI or Synchronize with FamilySearch family tree. Attention to details up front can save time, effort, and frustration in the long run. The IGI and FamilySearch family tree have many inconsistencies and inaccuracies but these programs are compilations from many sources created over a long period of time. As you (or when you can) synchronize your records with the FamilySearch family tree everything you add to that website should be "worthy of all acceptation" by today's standards, other researchers, your ancestors, your descendants and, or course, the Lord.

We have been given the tools that we need to help us. I hope we will use them to their fullest advantage.

Quick Tip

If you want your direct-line ancestors marked with a symbol for easy identification, do the following:

- Open the **Edit Individual** screen in PAF and go down to the **Custom ID** field and enter an asterisk, pound key or symbol of your choice.
- After marking your ancestor's record, go to **Tools** and select **Preferences**
- Click the **Names** tab
- Under the heading **Append to Names** and select **Custom ID**
- Click **OK** to save the changes and close the window.
- You will see the custom ID symbol at the end of your direct–line ancestor's name.

CAUTION: Make sure FamilyInsight does not add the PID as a custom ID (and erase your marking) by opening FamilyInsight, clicking on **Edit** and choosing **Preferences**.

- On the **FamilySearch** tab select, **Add FamilySearch ID, but not as a Custom ID**
- Click OK to close the Preference window.

Heritage Collector Suite Updated – Special Offer for New Buyers

Heritage Collector Suite 5.2 has been released. Those of you who have the 5.0 version or later, may update free of charge. Everyone who purchased *Heritage Collector Suite* version 5.1 from us should have gotten an email with the link to download this free update. If you did not get that email, please send an email to us at support@ohanasoftware.com and tell us you need the link to *Heritage Collector Suite*. Please make sure add this email address to your address book so our reply can reach you.

This new version allows you to drag and drop a photo into programs such as Word, WordPerfect, Open Office, etc. or even into Legacy. You can also cut and paste photos into other genealogy programs.

To help you take better advantage of the training videos (How Movies), you can pause the video, practice what you learned, then click Play to continue the movie. New "How" buttons were added for additional training assistance.

To learn more about the program, click here.

Buy the downloadable version of *Heritage Collector Suite 5.2* today for the introductory price of $74.95. ($20 off regular price) This offer includes the Digital Family History Guidebook in PDF format. This is a special limited–time offer! Click here to save.

Odds and Ends

To Buy or To Update, That is the Question!

If you are asking yourself what you need to do in order to use FamilyInsight, read on! If you have **EVER** and I do mean **EVER** owned a copy of PAF Insight, you only need to purchase an Update License. If you are using the 60–day free trial for FamilyInsight but had PAF Insight in the past, you should get the Update License.

If you have **NEVER** owned PAF Insight, you should buy the program or try the 60–day free trial, then purchase FamilyInsight.

No Reply?

When you write to us we respond as quickly as possible. Therefore, if you do not hear back from us within a few business days, it could be that our email to you was undeliverable. If you live within the US and Canada, we call you to verify the email address. If you live elsewhere, we pray you will contact us again or login on our website and update your email address so we can resend the reply. We really do want to provide you with the service you expect but some things are out of our hands.

Sometimes our replies end up in the spam file or junk mail file of your email. Please put our email address into your email address book so you can get our replies. Our email address is, support@ohanasoftware.com. The newsletter comes from, support_agent@ohanasoftware.com. Please add this address to your address book if you want to get our emails.

If you send us an email from our online support system, you are required to enter your email address. PLEASE double check your entry. If you enter the address wrong, not only will the email bounce but we may not be able to find your in our system and then we cannot call you. Please, sign your name on all emails so we can identify you more easily.

Ohana Insights Too Small to Read? Will Not Print?

Each month we hear from a handful of new customers who have problems reading Ohana Insights because the print is too small or they cannot print the newsletter. Others write requesting back issues because they missed issues due to changing email addresses. Every issue of the newsletter is available online as a PDF file. This file type allows you to adjust the size so you can easily read it online. You may also save and/or print a copy for reference. The newsletters are available at: https://www.ohanasoftware.com/?sec=Newsletter

Click on the PDF link for the issue you need. There is also an index to all the back issues in case you are looking for something specific.

Login Problems?

When you use FamilyInsight (and PAF Insight) to search the IGI, synchronize with the FamilySearch family tree or edit places, it asks you to login. The specific login is listed on the login window. To search the IGI, the window asks for your www.familysearch.org username and password. Since FamilyInsight (PAF Insight) is going to one of these two FamilySearch websites, it is the FamilySearch login that you need. We do not have access to your FamilySearch login information but you can retrieve it directly from FamilySearch. Both websites have methods for retrieving the login for that specific website. You may also call Worldwide Support and ask for your username and password, especially if you have a new email address. Their toll free number is 1–866–406–1830.

Latest Version of FamilyInsight

Version 2009.3.18.0

Enhancements

- Added the ability to view and change the summary data for a person on new.familysearch.org.

Bug fixes

- Fixed missing check boxes in Merge mode.
- Fixed problem with some place suggestions not appearing.

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.

Copyright © Ohana Software 2008 If you wish to subscribe or unsubscribe to this newsletter, click here and log in to change your preferences.