How To Use Family Tree Wisely

NOTE: Please pay special attention to Chapter F and to Steps 5 and 6 in Chapter G.

Pages changed in this version: F1, G6a, G6b, L1.

George W. Scott

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This manual and its updates can be downloaded for free at www.usingfamilysearch.com. Stevenson’s Genealogy Center in Provo prints the manual. Phone: (801) 374-9600.

A video tutorial based on this manual is being produced and will be available for free download at www.usingfamilysearch.com.

PLEASE TELL YOUR FRIENDS AND RELATIVES ABOUT THIS MANUAL. The better-trained Family Tree patrons become, the fewer who will mess up our shared tree!

About The Author

George Scott began working on his family history in 1969. In 1971, he presented a proposal for a stake extraction program to Church leaders; the extraction program has provided half the names used for temple ordinances during the past 4 decades. In 1981, he served on the Ancestral File design advisory committee. His involvement with New FamilySearch began in 2000; he beta-tested the system in February 2007. He has spent thousands of hours beta-testing, teaching nFS and Family Tree classes, working on his own nFS/Family Tree lineages, and helping other nFS and Family Tree patrons.

Please send comments, suggestions and questions to: GeorgeSonOfCarl@aol.com. To be notified of major updates, send an email entitled Add Me To The Update Distribution List.

Author’s Appreciation to You

I first posted “How To Use New FamilySearch Correctly” to the internet in July 2009. Since then, 50,000 genealogists have downloaded it. FamilySearch Support missionaries have emailed me to say they are using it; Family History Center Directors are using it to teach at their centers, and Family History Consultants are using it to teach in their wards. I never expected the manual to be so well received. I would like to express my profound appreciation to all who have taken the time to study and use the manual.

Acknowledgments

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FOREWORD

The Purpose of This Manual Is To Help You Clean Up Your Family Tree

There is a great amount of work required to clean up our ancestors’ records in Family Tree. The bulk of the cleaning will fall upon the 3% of members who have done extensive research into their family history. However, everyone can link Sources into your ancestors’ records.

Many would like to make additional meaningful contributions, but just don’t know how. Please consider Descendancy Research. (See Chapter I and Appendix A.)

For the vast majority, the biggest way to contribute to the family history effort would be to become Indexers in the FamilySearch Indexing program. Indexing is the simplest of all family history research activities. The Indexing program is revolutionizing the way we do family history research, making it much simpler, much faster, and much more accurate. (Please see Chapters I and J.) Millions of Indexers are needed to index the billions of records of genealogical value. Every able-bodied person aged 13 and above who has access to the internet should volunteer as an Indexer. To learn more about Indexing please go to Indexing.FamilySearch.org or talk to a Family History Consultant.

Those Without A Family Tree On New FamilySearch

Converts with no L.D.S. relatives generally won’t have to clean up an existing family tree. Instead, you need to build your family tree from scratch. In this manual, in Chapter F, you will do Steps 1 - 4, then Step 13, then Steps 8, 11, 12, 14-18. You will probably have little to do in Steps 5 - 7, 9 and 10.

You will have the joy of discovering your ancestors and doing temple work for them. When you get back to the early 1800's, your lineages may run into the family trees of other members on Family Tree, allowing you to piggyback on their research.

To Our Friends Who Are Not Members of The Church of Jesus Christ of Latter-day Saints

Family Tree is now available to the general public. We welcome all as our brothers and sisters to help build an accurate family tree of the human family. Please disregard sections of this manual which refer to temple ordinances, as those features are not pertinent to genealogists outside the L.D.S. Church. Also disregard Appendices D - F. But I hope this manual will otherwise be beneficial to all patrons.

To all of you, I wish you God Speed! Angels of heaven will attend you in this wonderful work in which we learn about and grow in love for our ancestors.
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Note: Please give Appendix F to your Bishop.

Please Note: Since Family Tree is still in the developmental stage, this manual will be updated frequently. Therefore, the page numbering system is by chapter, rather than a running number system throughout the entire manual. Chapter G (the longest chapter) has a page numbering system based on its subchapters. This will facilitate adding or deleting pages.
CHAPTER A: WHAT IS FAMILY TREE?

Family Tree is a new website currently under development by FamilySearch. It is scheduled to replace New FamilySearch in early 2013. New FamilySearch was a great advance in genealogical work, but it has its problems. Family Tree will fix many of those problems.

Family Tree is basically a new interface to the existing New FamilySearch database, so it uses the same database as New FamilySearch. Therefore, you won’t need to re-enter your data.

**Family Tree Offers Two Major Advantages over New FamilySearch:**

1) **You can edit the erroneous information contributed by others.** You can even correct erroneous relationships established by other contributors! That will allow you to clean up those huge messes in New FamilySearch that perturb you.

2) **You can create live links into source documents** located on the internet, particularly the Indexed records. This will enable you and other patrons to readily compare the data in the ancestor’s Family Tree record against the ancestor’s historical documents. This is a huge step forward. (Please note that the more records we index, the more records we will be able to link into our ancestors’ records at Family Tree. So we should all become Indexers!)

**You Should Start Using Family Tree Immediately**

It is important to start using Family Tree immediately, because some data will not be transferred from New FamilySearch to Family Tree. The only birth, christening, death and burial data which will be transferred is that which appears on the Summary screen. The other opinions of birth, christening, death and burial which appear on the Details screen will NOT be transferred to Family Tree. Unfortunately, many Summary screens do not reflect the most accurate data, so it is possible that some data may be lost. So, please do Step 5 in Chapter G immediately.

I especially recommend you start using Family Tree immediately if you are knowledgeable and diligent in caring for your ancestors’ records. If you are the first to work on your ancestors’ records in Family Tree, you will probably have the greatest influence on how those records look long-term. Other patrons will still be able to make changes later, but if you do a good job of documenting your ancestors’ records with source links and explanations, then other patrons will generally be influenced by your research. You can correct erroneous data which is presently in

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1You can monitor the changes other patrons make by using the Watch feature. Then, if you disagree with a change a patron makes, you can assemble your source data and communicate why your conclusion is better-founded. Family Tree maintains a History of each ancestor’s record, so you can see the information which was there prior to the patron’s change. If you strongly disagree with a patron’s change, you can restore the former data by simply clicking Restore. However, you should give a well-documented explanation for doing so.
New FamilySearch and pre-empt potential problems by making a strong case with source links and clear explanations.

**Family Tree Now Has Its Basic Features Functional**

Family Tree is still in the developmental phase, but at this point most of the basic features are operational. You can edit a person’s data, including data contributed by other patrons. You can also create Source links into the Indexed records and other websites. You are also able to add individuals and correct erroneous family relationships (both husband-wife relationships and child-parent relationships).

You can now merge records on Family Tree, and you can reserve names for the temple on Family Tree. You can also create or update Discussions. Most of the data at New FamilySearch has been copied to Family Tree; the Notes and Sources will be copied to Family Tree within a few weeks.

Thereafter, new features will be created, such as the ability to attach photos and other documents which you have at home.

**Merging instead of Combining Records**

New FamilySearch combined records, but Family Tree utilizes the traditional merge procedure. So in Family Tree, a person will have just one record, not a Combined Record containing many individual, often-conflicting records. An ancestor is not supposed to have multiple birth scenarios in Family Tree; descendants are to collaborate to agree on what was the correct data, based upon Sources which they should link into the ancestor’s record.

The Merge feature is now operational in Family Tree. We are told that in a future release of Family Tree, patrons will be able to separate out records which pertain to others, even in IOUS (Individuals of Unusual Size).

Merging and editing others’ contributions are a huge departure from the original philosophy of New FamilySearch, in which the right to differing opinions was virtually sacrosanct. In Family Tree, the guiding principle is the wiki concept of the community of users working collaboratively to determine the truth. However, changes made in Family Tree can easily be reversed by a dissenting patron, using the Restore feature. These are reasons why you want to use the Watch feature for those ancestors whose records you want to monitor.

If you feel there is a valid argument as to which birth (or death) data is correct, create a Discussion.
The Wiki Model

For future developments, FamilySearch has strongly embraced the “wiki” model—a community in which any registered user can contribute information, and any registered user can change anyone else’s information, and which is governed by a mediation system. For this reason, Family Tree patrons are allowed to change information provided by other contributors.

But FamilySearch needs to develop a dispute resolution process like Wikipedia’s. (Edit wars occur constantly on Wikipedia, but it has developed procedures to help disagreeing parties reach mutual agreement through third-party opinions, informal mediation, and formal mediation. As a final resort, arbitration is invoked. In extreme, blatant cases, a user may lose privileges.)

Until a dispute resolution process is developed, FamilySearch will rely on patrons to settle disagreements amiably among themselves. Greater communication is needed. (And this begins with all patrons making their email address available.) Most of our problems could be resolved through increased communication and collaboration. Reliance upon source documents must take priority over family traditions, so Family Tree’s ability to link source documents to the ancestor’s Family Tree record should resolve many disagreements. The Discussion feature needs to be utilized more extensively, and all Discussions need to be maintained at a civil and friendly level. When Contributors edit data, they need to add clear and detailed explanations stating why they feel their conclusions are valid.

The current thinking is a total reversal of the original concept (that only the contributor of the data can correct it) to a “free-for-all” wiki approach. As frightening as that initially sounds, there have been relatively few free-for-all fights over the data selected as “correct” in the New FamilySearch Summary screens, which is heartening. However, the major conflicts are family relationships (who was married to whom, and who was the child of whom), which the Summary screen does not address. So while a largely “free-for-all” approach is workable, there will ultimately need to be an arbitration system to settle matters which Contributors cannot resolve among themselves. And, again, the most spirited disagreements involve family relationships.

But before an arbitration system can be established, existing service opportunities need to be better filled. FamilySearch needs more part-time service missionaries to serve in the Support Mission before various beneficial new features can be initiated. So, if you could serve at least 15 hours weekly for at least one year and are reasonably computer savvy, please consider becoming a FamilySearch support missionary by calling 1-800-453-3860 extension 20850, or by e-mail to mission@familysearch.org. You can find more particulars by signing in on FamilySearch.org, click Help in the upper right-hand corner, and type 100134 in the search box. (Document 100134 is entitled How To Become A FamilySearch Missionary.)

FamilySearch’s Upcoming Plans for Family Tree

In the next few months, FamilySearch plans to complete the following upgrades to Family Tree:

1) Ongoing Data Migration:
a) The Notes, Sources, and Other Events will be transferred to Family Tree.

b) Not all of the data on New FamilySearch will be transferred to Family Tree. Only one version of the person’s gender, birth data, christening data, death data, and burial data will be transferred to Family Tree; this will be the data which appears on the Summary screen in New FamilySearch.

Also, the endless listing of contributors will be dropped; only one contributor will be listed for each piece of data. Additionally, we are told that “the records that were merged badly in Ancestral File” will not be transferred to Family Tree. (I don’t know how they will identify those records.)

For more details, see the whitepaper entitled *Moving Information From New.FamilySearch.org To Family Tree*. You can find this whitepaper and other instructional materials concerning Family Tree by clicking Help in Family Tree.

2) IOUS processing: IOUS will be “blasted apart” to allow patrons to clean up their records. There are approximately 1 million IOUS, so they are a huge problem.

**FamilySearch’s Future Plans for Family Tree**

In the more distant future (some time after 2012), FamilySearch plans to make the following enhancements to Family Tree:

1) You will be able to upload directly onto Family Tree the photos and other documents regarding your ancestors which you have at home.

2) Sources in FamilySearch’s Historical Records Collections will show to whom in Family Tree the source records have been linked. This is an important double-check on the accuracy of attaching sources.

3) Voting and agreement measures: Descendants will be able to vote on what data is correct for their ancestors. Thereafter, making changes will become a more onerous process, requiring documentary proof to alter the agreed-upon data.

4) Trust factors for contributors: Patrons will be able to give a contributor stars (that’s my term, not FamilySearch’s), whereby the contributor will be recognized as a trusted contributor.

**Let Us Make Hay While The Sun Shines**

Elder Henry B. Eyring observed: “The Lord has poured out knowledge about how to make [genealogical] information available worldwide through technology that a few years ago would have seemed a miracle...With those opportunities there comes greater obligation to keep our trust with the Lord. Where much is given, much is required.” (*Ensign*, May 2005, pages 79-80.)
CHAPTER B: A HISTORIC OVERVIEW OF YOUR ANCESTRY

“The Most Recent Common Ancestor of Mankind” or “One Big Happy Family”

The Bible identifies Adam and Eve as the parents of all mankind. Conversely, for the past century, physical anthropologists and paleontologists have argued that our most recent common ancestor (MRCA) must have lived 200,000 years ago, probably in northeast Africa.

However, recent statistical analyses by Joseph Chang, a professor of statistics at Yale University, and his colleagues Rohde and Olson, provide a much more recent date for mankind’s MRCA.3 Chang began with European historical statistics involving demographics, migration patterns, wars, diseases, etc. He concluded that of Europe’s population in 1000 A.D., approximately 20% have no descendants alive today. Of the remaining 80% of Europe’s population in 1000 A.D., each and every one is the ancestor of every person alive today with any European blood.

Chang next extrapolated back to the year 1 A.D., utilizing sophisticated statistical modeling. He came to the conclusion that with the exception of some small isolated populations in Siberia and the Pacific Islands, the same basic parameters applied more broadly to all mankind: Approximately 20% of the world’s population living in 1 A.D. have no descendants alive today, but the remaining 80% of the world’s population alive in 1 A.D. (less those small isolated groups) are each the ancestor of every single person alive today.

Next, Chang estimated that if you go back to about 600 B.C., the same parameters apply to those isolated populations in Siberia and the Pacific Islands. Thus, 20% of the entire world’s population alive in 600 B.C. have no living descendants today, but of the remaining 80%, each is the ancestor to every person alive today.4


4Subsequent studies concentrating on those small isolated groups suggest some may have remained in isolation sufficiently long to push the human MRCA back a few additional millennia. The lack of historical documentation makes it impossible to reliably place a date on mankind’s MRCA, although the 6th millennium B.C. is considered the outermost date by the statisticians. However, for about 99% of mankind, our MRCA dates to 1 A.D.
Implications of the MRCA Study

How does the study of mankind’s MRCA relate to you?

If you have any European blood, then you are a direct descendant of 80% of the European population circa 1000 A.D. (and you are collaterally related to the other 20%). Your direct ancestors circa 1000 A.D. numbered about 30 million (80% of Europe’s 37 million residents in 1000 A.D.\textsuperscript{5}).\textsuperscript{6}

Similarly, if you have Asian blood, then you are a direct descendant of 80% of the Asian population circa roughly 900 - 1000 A.D. (and collaterally related to the other 20%), with perhaps 148 million ancestors at that time.

If you have African blood, you are a direct descendant of 80% of the African population circa roughly 900 - 1000 A.D. (and collaterally related to the other 20%), with perhaps 25 million ancestors at that time.

Everyone of European blood is a descendant of Lady Godiva, one of the most noble of all the sons and daughters of Adam and Eve. She was the wife of the Earl of Mercia (a principality in central England). The Earl had levied unbearable taxes; the people pleaded with Lady Godiva to convince her husband to reduce the tax burden. Flippantly, the Earl answered Lady Godiva that he would reduce the taxes if she would ride naked through town, not thinking she would even consider it. After all, she was the Countess, a lady of great dignity (and probably about 40-50 years of age). But she loved the people so much, she was willing to risk public humiliation for the rest of her life in order to help her subjects. And the people greatly loved her. So, at the appointed day and hour, when Lady Godiva disrobed and began riding her steed through Coventry (the capital), everyone had retired to their homes, closed their doors, and shuttered their windows. Coventry, a busy commercial center, looked like a ghost town. The Earl had to abide by his word—he lowered the taxes. To this day, Lady Godiva is the second-most beloved of all English folk heroes, surpassed only by Robin Hood.

The story of Lady Godiva brings us to a frequently-asked question: Are you descended from royalty? Yes, you are.\textsuperscript{7} You may or may not be able to find documents tracing your family line

\textsuperscript{5}Population estimates for 1000 A.D. were taken from www.worldhistorysite.com/population.html.

\textsuperscript{6}This should not be surprising. The number of your direct ancestors increases exponentially as you go back in time. You have 2 parents, 4 grandparents, 8 great grandparents, etc. Assuming 30 years between generations, there would be about 32 generations between you and 1000 A.D., so 2 raised to the 32\textsuperscript{nd} power would give you over 4 billion ancestors (4,294,967,296, to be precise) in the year 1000 A.D, far more than the earth’s population at the time. Most of those are duplicate positions in your pedigree chart.

\textsuperscript{7}www.theatlantic.com/doc/200205/olson.
back far enough to make the connection to royal families, but everyone–black, white, Hispanic, Asian, or Polynesian–is descended from royalty. After all, if you go back to 1000 A.D., you are related to everyone on your continent of origin, and there were kings and queens in Africa, Asia, Oceania, Europe, and the Americas.

You are descended from the ancient Roman emperors, Cleopatra, the ancient Pharaohs of Egypt, and Alexander the Great. (You are also descended from Aristotle, Plato, and many great scientists and mathematicians.)

So, yes, you are of royal descent. Now, that is both good and bad. You have royal blood flowing through your veins, but remember that not all kings were good guys.

It is humbling to contemplate that, assuming at least one of the brothers or sisters of the Savior was among the 80% who had descending lineages which survived to our time, then you are descended from the Holy Family (Mary and Joseph).

Debunking Racial Myths

Racists are unfortunate, ignorant souls. They fail to realize that every white American has African blood flowing through his veins, and vice versa.

After all, the MRCA study shows that, setting aside a few isolated Siberian and Pacific Islander populations, each of us is descended from 80% of the members of every ethnic group existing in 1 A.D. (and collaterally related to the other 20% of each ethnic group). Thus, every white American has millions of black African ancestors. And every black American has millions of white ancestors.

Probably about 15% of the ancestors of each white American were black Africans.

Each of us has blood from Nigeria, India, China, Iran, Mozambique, Russia, Tonga, the Native Americans, the Australian aborigines, Sweden, Egypt, etc.

Historical records and archaeological remains demonstrate there were migrations going on continually all throughout history. Jews migrated to Japan 2,000 years ago. Africans traveled to the Americas many centuries before Columbus. Ghengis Khan caused a massive influx of Asian blood into eastern Europe.

So there is no such thing as a racially-pure people. We are all mongrels. We are Heinz 57. Instead of disparaging other racial and ethnic groups, we should recognize and embrace our common heritage.

In the end, above all, we are united familially by the fact that we are all sons and daughters of our Heavenly Father.

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CHAPTER C: COLLABORATION IS THE KEY TO SUCCESSFUL FAMILY HISTORY RESEARCH

The MRCA (Most Recent Common Ancestor) study demonstrates how amazingly interrelated we are. It also points out the huge number of ancestors you have—tens of millions!

If you just go back to the year 1500, you could have tens of thousands of direct ancestors; when you add their siblings, you may have over 100,000 members of your direct ancestral families.

So there’s no way for you to research and identify all of your ancestors in your brief mortal lifespan. The only way we can accomplish the task of identifying our dead and performing the temple ordinances for them is to work together.

Thus, **collaboration is the key to successful family history research.**

And, fortunately, *Family Tree is all about collaboration.*

Through the internet, Family Tree provides us the opportunity to collaborate in ways we never dreamed of before. The Lord promised to hasten the work in His day—and that is precisely what He is doing!

**Collaboration—A New And Improved Approach**

Collaboration will allow us to work more efficiently and more effectively. In the past, we used “the shot gun approach”—we each tried to research all of our ancestral lineages. But they are so vast that most of the research was sketchy. What generally happened was endless duplication of a few easy-to-find families, while other families of your lineage were overlooked. We put in a ton of time, but we largely spun our wheels.

Through effective communication and collaboration, we will be able to accomplish more, do it in less time, and do it more accurately.

**We need to:**
1. communicate more with each other,
2. each take a small niche of the family tree to research intensively, and then
3. share what we have discovered.

**What we need to do is communicate with our distant relatives, and each agree to intensively research a different, small niche of our family tree, and then share our research with each other on Family Tree.** Effective communication can make that happen!

If you do that, the day will come when the Lord will say to you: “Well done, thou good and faithful servant: thou hast been faithful over a few things, I will make thee ruler over many things: enter thou into the joy of thy lord.” (Matthew 25:21.)
The Keys To Successful Collaboration: Communication and Respect

What does it take for collaboration to work?

First, it requires the ability to communicate. In Family Tree, that means everyone needs to make their email address available to other Family Tree patrons, so we can collaborate.

Second, we have to be respectful to each other, even when a distant cousin messes up one of your lineages. After all, the Lord has forgiven you—you can forgive others.

Please don’t be angry at your relatives for genealogical mistakes they have made.

Probably the greatest threat to the success of Family Tree is the anger you feel when someone has messed up your family tree. This is a natural feeling, but it is a sentiment of the “natural man.” We have promised to forsake the “natural man” and take upon us Christ’s name.

If many patrons were to become angry and communicate unkind sentiments toward their distant cousins, Family Tree would screech to a halt. Family Tree can only succeed if we treat all other patrons in the same manner in which we would want to be treated (the Golden Rule).

Thus, if for no other reason than the desire to accomplish the task the Lord has given you, you must purge your heart of unkind feelings toward those who have made mistakes in your family tree. They may have erred negligently or simply lacked adequate time or resources to perform the high quality of research you demand of yourself, but certainly they did not commit the mistakes intentionally. If we cannot forgive unintentional errors, where do we stand before the Lord?

Let us become Christ-like in our sentiments toward our distant cousins; let us emulate the Savior.

Let’s regard our relatives as partners in this great venture rather than as competitors for our family tree!
CHAPTER D: PERFECTING COLLABORATION THROUGH LINKS TO HISTORICAL RECORDS

We have seen that collaboration is the key to successful genealogical research.

We have also seen that collaboration requires us to make our email address available to other Family Tree patrons, and that we need to treat our distant cousins with Christ-like love.

Family Tree provides us yet one more key to perfecting collaboration: the ability to link historical records into our ancestors’ records in Family Tree. This allows us to instantaneously share our sources with other descendants.

I cannot over-emphasize the importance of this new feature. It is key to perfecting our system of genealogical record-keeping.

Genealogists have long recognized that we cannot achieve accurate genealogical records without sharing our sources—and that ready access to source records is also crucial. It’s not enough to cite a historical document that sits on a dusty shelf in an archive thousands of miles away, nor even to cite a record on a roll of microfilm, which might take weeks to order and hours to search. If we are going to check sources, we need instantaneous access to those records. And that is what linking source records into Family Tree will give us! When you link a source record into a Family Tree record, you and all the other descendants of that ancestor can click on the link and instantaneously see that source record. Then, we can check the origin of other patrons’ conclusions to see if they are valid.

It is only when all interested descendants can readily share their source documents with each other, and all the interested descendants can review the source documents for pertinence to the ancestral family, that we can come to a meeting of the minds and agree on who was married to whom and who was the child of whom. Then, and only then, can we prepare “a book containing the records of our dead, which shall be worthy of all acceptation” (D&C 128:24).

Through FamilySearch Indexing, the vast array of the world’s records of genealogical value are being digitized into a searchable database. We will, in our lifetime, index all the records of genealogical value in the world—and it will be accomplished much sooner than people expect.

The Indexing program will enable us to do genealogical research 100 times faster than we have in the past. I’ve been using Family Tree for a few months now. In that time I’ve linked 2,400 Indexed source records into my family tree. I’ve also added about 300 people to Family Tree—and I wasn’t even looking for them. They are members of collateral lines that I bumped into while I was conducting computer searches of the Indexed records for my ancestral families. I didn’t go out looking to add them into the family tree, but since their records were there, showing up in the match list for my own ancestral families, I felt it would be a shame not to take a few minutes and link in their source records too. And when I discovered that many of them didn’t appear in Family Tree, I added them in. To do that much genealogical research in the past would have required thousands of hours.
And further enhancements to the system are planned. When you link a source to your ancestor in Family Tree, the computer will also show a link in the source record to your ancestor. (The links will go in both directions.) This will be immensely helpful, as it will serve as a double-check on the accuracy of our linking of source records to our ancestors’ Family Tree records. For example, if a patron links your great grandmother’s christening record to someone other than your great grandmother, you will be able to see the error, and you will be able to help correct the error. This will greatly improve the accuracy and integrity of Family Tree.

I hope you catch the vision. Family Tree and FamilySearch’s Records Search are a powerful combination! This is an inspired program. It was created in the mind of God long ago. He inspired a bunch of techies to develop the computer. He inspired others to create the internet. And then He put it all together—and that is what we are seeing today.

FamilySearch Indexing and Family Tree are two sides of the same coin. You can’t really speak of the one without speaking of the other.

So I hope everyone is an Indexer or an Arbitrator, because we can’t build the system without working on both ends: Family Tree and FamilySearch Indexing.

With the Indexed records, we will build the Family Tree. And with the Indexed records, we will check the accuracy of the Family Tree.

It is a great and a grand and a glorious work!

Step 8 in Chapter G will explain the mechanics of linking source records into Family Tree records.
CHAPTER E: WORK IN FAMILY TREE, NEW FAMILYSEARCH, RECORDS SEARCH, AND P.A.F. SIMULTANEOUSLY

When you work in Family Tree, you actually need to work with several databases at the same time. So, you should open 4 windows for:

New FamilySearch,
Family Tree,
FamilySearch’s Records Search, and
your PAF file.

This will allow you to perform functions in New FamilySearch, Family Tree, and Records Search, while being guided by the data in your PAF file.

Until New FamilySearch is closed down (in early 2013), we should check our ancestors’ records in New FamilySearch to see whether there is birth or christening or death or burial data that we need to manually transfer to Family Tree. (Step 5 in Chapter G explains this.)

And in order to link source records into your ancestors’ Family Tree records, you need to search for those source records in Records Search.

I have a laptop and a desktop computer, so I keep PAF open on my desktop computer, and the other programs open in browser windows on my laptop. That makes it easy for me to look at my PAF records while working in the other three databases.

9Throughout this manual, I use the term PAF generically, to include RootsMagic, Ancestral Quest, Legacy Family Tree, Personal Ancestral File, and other home computer genealogical database programs.
CHAPTER F: WORKING IN LOGICAL ORDER IN FAMILY TREE

You can save yourself an enormous amount of time (and frustration) by working in logical order in Family Tree, by following the steps below. The step-by-step sequence below assumes you have never worked on New FamilySearch before. Chapter G explains each step in detail.

Step 1. Set your Profile Settings at FamilySearch.

Step 2. Connect yourself with your family tree, and learn to navigate Family Tree.

Step 3. Learn where to find Help, and start the online training.

Step 4. Map out a plan for working with your family tree.

Even if you formulated your plan in the past, it is good to review your plan again.

Step 5. Review your ancestors’ New FamilySearch records to see whether there are data you need to manually add to their Family Tree records.

You need to do Step 5 immediately or some data in New FamilySearch could be lost. Do this for the portion of your Family Tree which you plan to clean up. Step 6 is also urgent, as it needs to be completed before New FamilySearch is discontinued.

Step 6. Make sure your ancestors’ records are not hijacked records.

Do Steps 7 thru 12 for an ancestor before moving on to another ancestor:

Step 7. Merge records for the ancestor.

Step 8. Attach Sources to the ancestor’s record.

Step 9. Clean the ancestor’s record.


Sometimes, after you have attached sources and cleaned your ancestor’s record, Family Tree’s search engine may find more records which need to be merged. And that may give you additional data which will help you find more sources, allowing you to further clean the ancestor’s record.

Step 11. Create Discussions concerning the ancestor, and update or delete old Discussions and Disputes.

Step 12. Add the ancestor to your automatic notification system (the Watch feature).
Do Steps 13 and 14 for a nuclear family before moving on to another nuclear family:

Step 13. Search for missing family members.

Step 14. Reserve family members for temple ordinances (if you are LDS).

Complete Steps 5 - 14 for the portion of your family tree which you plan to clean up.

Thereafter, do Steps 15 - 18 for that same portion of your family tree:

Step 15. Make the necessary preparations for Synchronizing your PAF file with Family Tree.

Please Note: Steps 16 - 18 cannot be fully performed at this time, until the Affiliates are able to revise their software for the Synchronization process in Family Tree.

Step 16. Synchronize your PAF file with Family Tree.

Synchronization allows you to selectively copy data from PAF (your home computer database) to Family Tree and from Family Tree to PAF.

Keep two logs:
   a) People for whom you added data (for Step 17), and
   b) People you added to Family Tree (for Step 18.)

Step 17. If you added data to people’s Family Tree records, review those records to:
   a) See if you need to make further modifications to their records, based on the data you added.
   b) See whether the added data will enable you to find additional Sources to attach to their Family Tree record.

Step 18. If you added people to Family Tree during Synchronization:
   a) Attach Sources to their Family Tree record: See Step 8.
   b) Add them to your automatic notification system: See Step 12.
   c) Create Discussions: See Step 11.
   a) You might reserve them for temple ordinances (if you are LDS): See Step 14.
Ongoing activities throughout the remainder of your life:

**Collaborate:** Communicate with other Contributors to divide your family tree so each researcher works on a distinct niche and then shares all his research with the other researchers.

**Watch:** Watch the records in the portion of your Family Tree which you have researched (your research niche), through the automatic notification system (the Watch feature).

**Index:** Serve at least one hour a week as an Indexer or Arbitrator in the FamilySearch Indexing program.
CHAPTER G: WORKING STEP-BY-STEP THROUGH FAMILY TREE

This chapter is a study guide correlated with the steps listed in Chapter F, Working In Logical Order In Family Tree.  

Step 1. Set your Profile Settings at FamilySearch.

SIGNING IN TO FAMILY TREE:

To use Family Tree, go to familysearch.org and sign in by entering your LDS Account Username and Password.  

(Sign In is in the upper-right hand corner of the FamilySearch home page.)

10Family History Consultants can use this as a lesson plan to teach a Family Tree class in Sunday School or at a Family History Center, while the students use it as a study guide.

11If you lack an LDS Account (or if you are not LDS and lack a FamilySearch Account):
A. Sign onto familysearch.org.
B. Click on Sign In in the upper right-hand corner.
C. Click on Create New Account.
D. If you are not LDS, click on FamilySearch Account. Fill in the data, and write down your Username and Password. (Go to instruction F below to continue.)
E. If you are LDS, click the LDS FamilySearch Account button. Then click Continue.
   (1) Enter your Membership Number (from your temple recommend or your Individual Ordinance Summary, which you received at the same time as Tithing Settlement. If you have neither of these, contact your Ward Clerk.)
   (2) Enter your Birth Date.
   (3) Enter the text from the picture (a security measure to thwart automated hacking).
   (4) Click the Next Step button.
   (5) FamilySearch will identify you from the membership records and ask you to confirm your identity by clicking on the Yes button.
   (6) The next screen allows you to establish your Profile for your LDS Account.
      (a) The Display Name is the form of your name you want displayed when you enter the websites which your LDS Account will give you access to.
      (b) Create your Username and your Password. (You can change these later, if you desire.) The Password should be at least 8 characters and include UPPER CASE, lower case, and a number.
      (c) Write down your Username and Password so you won’t forget them.
      (d) Click the I have read and accept the Conditions of Use button. Then click Create My LDS Account.
F. You will be instructed to go to your email and click the Complete Registration link contained in the email they will send you. That will activate your account.
G. You can now return to FamilySearch.org and sign in, using the Username and Password you have just created.
Notice that before you sign in at familysearch.org, the words *Family Tree* do not appear in the FamilySearch toolbar at the top of the familysearch.org home page (above).

But after you sign in at familysearch.org, the words *Family Tree* will appear in the FamilySearch toolbar, just to the right of the FamilySearch logo, as shown below:

Now, just click on *Family Tree*, and you are in Family Tree at familysearch.org.

**SET YOUR PROFILE SETTINGS AT FAMILYSEARCH:**

When you are signed in at FamilySearch, your name will appear in the upper right-hand corner of the FamilySearch home page.

To set your Profile Settings, hover your cursor over your name. A drop-down menu box will appear. Click on *Settings*. This will give you the opportunity to:

1) Change your Username and/or Password, if you so desire.

2) Indicate which Contact information you want to make public (viewable by other Family Tree users when you add or change data in Family Tree). **Please make your email address public at Family Tree**, so other patrons can contact you to collaborate.

3) Select which Notifications you want to receive. In the least, you should check the first box, so you will receive notifications of changes which are made by other patrons to the records you are Watching.
It is very important that you reveal your email address so other patrons can communicate with you.

Family Tree is all about collaboration. In the past, we had no effective way to collaborate. Collaboration will allow us to build our family trees much faster, and to do so far more accurately. Family Tree makes it possible to identify other descendants of our common ancestors and provides a means of communicating with each other via email. But that only works if we make our email address available to other patrons.

Email is a safe way to communicate; no one can come to your house and punch you in the nose. ☺ So, please make your email address available to other patrons. If you have any reservations about doing so, you can always create a separate email address solely for genealogical collaboration. You can create email addresses for free at many websites, including www.gmail.com, www.hotmail.com and www.aol.com.

Plus, you can use any Contact Name you want: Superman, Wonderwoman, or R2D2. So you can still maintain anonymity, if you wish, but communication is absolutely essential.

Providing your email address for collaboration purposes is absolutely essential if you contribute information to Family Tree.

**Assignment:** Update your Profile Settings, as explained above.

**Additional Resources:**
The following materials are accessible at FamilySearch.org. Click Help in the upper right-hand corner. Under Family Tree, click See the whole list:
1) *Introduction to the Family Tree:* a 2-minute video. Beginner level.
2) *Family Tree Overview:* an 11-minute video. Good basic overview—all first-time users of Family Tree should view this. However, it mentions “early access to Family Tree;” that time has passed; all LDS patrons now have access.
3) *Using the FamilySearch Family Tree,* Chapter 1. This reference manual is 192 pages in the LDS version, and 153 pages in the general public version.
Step 2.  Connect yourself with your family tree, and learn to navigate Family Tree.

When you sign in at FamilySearch.org and enter Family Tree, you immediately see your pedigree chart in the form of a bow tie.  You and your spouse are in the middle of the bow tie pedigree chart. Your descendants are to the left. Your ancestors are to the right.

What To Do If You Can’t See Your Ancestors

Sometimes you need to add your parents or grandparents in order to see your ancestors. You can do so by clicking Add Husband and Add Wife where their names should be.

This will bring up the search screen (which is entitled Add or Find Person) so you can search for an existing record of the missing family member. You can search for deceased persons, but not for Living Persons. (Due to privacy laws, Family Tree does not allow you to see Living Persons except members of your immediate family.) So, you can search to Find records for deceased parents or grandparents, but you Add living parents or grandparents.

After you have ensured your parents and grandparents are on your pedigree chart, several more generations will generally pop on.

Additional Resource: My Family Tree Is Empty—What Should I Do?  (In Family Tree, click Help in the upper right-hand corner.  Look under Family Tree.  Click See the whole list.  Click on My Family Tree Is Empty—What Should I Do?  Follow Steps 1 - 5.  Steps 6 - 12 are irrelevant to this question.)

Navigating The Pedigree Chart

You can zoom your pedigree in or out using the + and - signs in the upper left-hand corner.  You can also move the pedigree up or down or left or right using the pointers in the circle.  To return the pedigree to its original position, click in the center of the circle.

You can also move the pedigree in any direction by grabbing the page and pulling it in the desired direction.

You can see more ancestral generations in your pedigree chart by clicking the right arrow.  And you can collapse those lineages the same way.

12 You should be able to see all data for your minor children, but you can generally only see the name and gender of adult Living members of your immediate family.

13 To Add someone, use the Add Person tab in the search screen.  (Notice that at the top of the search screen, there are tabs for Add Person and Find Person.)
The Person’s Summary Card

When you click on a person in the pedigree chart, the person’s Summary Card pops up:

If you click on View Tree at the bottom of his Summary Card, a bow tie pedigree chart appears with him in the center, with his descendants to the left and his ancestors to the right. This is particularly helpful when you want to view an ancestor’s descendants:

The Person’s Details Page

If you click View Person at the bottom of his Summary Card, you see his Details Page. His Details Page is a long screen where you can see his Vital Information, Other Information, Family Members, Sources, Discussions, and Temple Ordinances:
**Vital Information** is the equivalent of New FamilySearch’s Summary screen.

To the right of the Vital Information is the **change history**, which lists all changes made to the record.

**Other Information** includes alternate names, etc.

The **Family Members** section lists both **Spouses And Children** and **Parents And Siblings**.

To see additional marriage data, click on **Edit Couple** next to the marriage data.

In the **Sources** section, you can link sources from FamilySearch’s Records Search (the Indexed records) or from any other website.

The **Discussions** section should be used abundantly to discuss relevant issues with other researchers.

The **Temple Ordinances** are listed at the bottom of the ancestor’s record.
Accessing Other Data from the Pedigree Chart

When you are in the pedigree chart, if you hover your cursor over a person, a temple icon appears above him. It reveals whether the temple work is Completed, In Progress, whether additional information is required, or whether you can Request Ordinances. If you click on Request Ordinances, a screen opens which allows you to reserve the ordinances.

Also, when you hover your cursor over a person in the pedigree chart, drop-down menus open which allow you to access the records for his children, other spouses, and other parents.

Additional Resources:
The following materials are accessible at FamilySearch.org. Click Help in the upper right-hand corner. Under Family Tree, click See the whole list:
1) Switching to Family Tree: a 4-minute video for patrons who are not comfortable with computers. It does not work on the Firefox browser.
2) Family Tree Quick Start Guide: This might be better for reference than for instruction.
3) Release Notes: Every time FamilySearch releases a new version of Family Tree, it publishes notes describing the new features. So, you should check the Release Notes periodically to see whether there are recent changes in Family Tree.
4) Using the FamilySearch Family Tree, Chapters 2 and 3.
Step 3. Learn where to find Help, and start the online training.

You have many training opportunities for Family Tree.

Family Tree is a great computer program, but it’s rather complicated, particularly if you aren’t accustomed to working on a computer. FamilySearch’s Help center offers several videos and pdf publications. The Assignments and Additional Resources at the end of each Step in this manual present these training materials in logical order of learning.

You might also check with your ward Family History Consultant, who may offer a class during Sunday School. Also, many Family History Centers offer classes on Family Tree.

Help abounds at Family Tree!

There are great helps at the Family Tree website. Help appears in the upper right-hand corner of all screens. This link takes you to the FamilySearch Help Center, which serves all FamilySearch websites. You can search for answers using the Help Center’s Search feature.

At the bottom of the Help Center screen, the Local Assistance tab lists your ward’s Family History Consultants, their phone numbers and their email addresses. They will be happy to assist you if you can’t find your answer in the Help Center. (It’s part of their calling to provide individualized help in ward members’ homes.) Also under the Local Assistance tab is info to help you call or visit your local Family History Center, where Family History Consultants will be pleased to help you.

Finally, you can call or email the FamilySearch Support missionaries. You can email them for help using the Send us feedback link at the bottom of most major screens. Or you can call them at 1 (866) 406-1830. (For phone numbers outside the U.S., go to the Help Center, and click Contact FamilySearch.)

And the 162-page Using the FamilySearch Family Tree explains most procedures step-by-step. (It is one of the training materials in the Help center.)
You Can Practice at the Family Tree Training Website

https://training.familysearch.org is a training website for Family Tree. It is helpful in Family Tree classes, or it can be used for practice at home. You can try out functions at the training website before using them on your real family tree. The training site contains fictitious names, dates and localities, so you can learn how to add and edit without the fear of making mistakes with real data. However, the training site does not have the merge feature nor the process of reserving temple ordinances, which are two of the most important functions.

Helper Function

The Helper function now exists in Family Tree, but you have to know where to look for it. You access the Helper function by clicking on the ball in the upper right-hand corner of the screen, below your name and the Help link.

A pop-up screen will appear, asking you for the Contact Name and the Helper Number of the patron you will help. The Helper Number is generally the last 5 digits of the patron’s membership number. A patron can see and can change his Contact Name and his Helper Number in the Settings.

When you “help” someone, their name appears as the Contributor, rather than your name. You can also see the living people whom the patron can see.

Assignments:
1. In the Help Center, briefly practice using the Search feature.
2. In the Help Center, click the Local Assistance tab. This will list your ward’s Family History Consultants, their phones and email addresses, plus Family History Centers in your area.
3. Spend a few minutes discovering the other Help Center features.

Additional Resources:
1. When you are signed in at FamilySearch.org, open another browser window and go to familysearch.org/tree-training. At the bottom of the page, the first Webinar is Introduction to FamilySearch Family Tree. This is a 20-minute basic overview of Family Tree. At this same web page, under Lessons and Activities, there are Practice Activities which you can use all throughout your Family Tree learning experience.
2) A comprehensive list of family history training materials is available in Document 106925. (At FamilySearch.org, click Help and enter 106925 in the search field.)

Assignment for Family History Consultants: Go to familysearch.org/consultant. After signing in, click on Online Training under the Core Training heading. There are courses specifically designed for Family History Consultants.
Step 4. Map out a plan for working with your family tree.

Suggestions for Your Plan for Working on Family Tree

a) It is easy to get lost in a large family tree and not know which branches you have worked on and which you haven’t. The easiest way to keep track of what you have done is to print off your PAF pedigree chart and check off each nuclear family as you complete it in Family Tree.

b) When you work on a given nuclear family, first work on the father, then the mother, then each of the children.

c) You need to decide how much of your family tree you will work on. Your lineages in Family Tree may stretch back further than your own records. Do you plan to work on Family Tree beyond the point of your own research? (Merge records, clean records, etc.?) Generally it is best to stay within the bounds of your own research and allow the researchers who submitted the records for earlier centuries to clean those records.

PAF And Family Tree: How They Should Work As A Complementary Team

People ask: Now that Family Tree exists, do I still need my PAF file? If you have more than a handful of names in your PAF file, the answer is definitely yes!

PAF has its role, and Family Tree has its role—the two are distinct but complementary. PAF should represent your personal family history research, while Family Tree represents the collaborative family history research. You may not agree with some of the collaborative research, so you can see how the two need to be maintained as distinct databases.

You should upload (copy) the vast majority of your PAF data to Family Tree (if it has not already been contributed by you or other contributors). But there is some information you will not want to upload to Family Tree. First, you should generally avoid uploading information about living persons. Be especially careful of mentioning living individuals in your PAF notes of deceased relatives. Also, there may be confidential information about deceased individuals (divorces, family feuds, crimes, insanity, etc.) which you would not want to upload. Don’t upload info to Family Tree concerning decedents born in the past 110 years if the closest living relative would not want temple work done. (See page G14f.)

Similarly, you should not download (copy) all the records in your Family Tree to your PAF file. If your personal family history research ends in the year 1800, don’t copy the Family

Don’t copy all the records in your Family Tree to your PAF file.

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PAF (Personal Ancestral File) is a home genealogy software program. If you don’t have a PAF file, you could print off your pedigree chart from New FamilySearch or Family Tree. I use the term “PAF” generically; the term equally applies to Ancestral Quest, RootsMagic, Legacy Family Tree, or any other family history computer program.

G4a
Tree records back to 1600. Define your PAF file as your personal research, distinct from the collaborative family tree research. There is no benefit to copying all those records into your PAF file, and you could never keep your copy up-to-date. They will be available (with all the latest research) on Family Tree anytime you want to peruse them.

You have millions of ancestors. Even if you just go back to the year 1500, you may have 100,000 members of your ancestral families. If you spent your entire mortal life performing genealogical research, you could never build your entire family tree alone. So define your niche, and let PAF chronicle your niche. Then, let Family Tree serve as a superstructure over your niche, expanding the family tree beyond the bounds of your personal research.

If you feel the absolute need to download lineages past the point of your personal research, it would be wise to use a separate PAF file, apart from your personal research PAF file. But you will never be able to keep it up-to-date, as your Family Tree will change almost daily, so it is a wasteful effort to try to copy beyond the bounds of your personal research.

**Assignment:**
Formulate a plan for working with Family Tree. Decide:
- a) how much of your Family Tree you will clean up (the portion that corresponds to your own research),
- b) how you will keep track of the work you have done (by checking off families on a copy of your pedigree chart), and
- c) what information you will copy from Family Tree to your PAF file (data on nuclear families already in your PAF file).
Step 5. Review your ancestors’ New FamilySearch records to see whether there are data you need to manually add to their Family Tree records.

New FamilySearch is scheduled to be completely closed down soon, possibly within a few weeks. Most of the information in New FamilySearch will be moved to Family Tree prior to closing down New FamilySearch. (Notes, Sources, and Other Events have not yet been moved from New FamilySearch to Family Tree, but will be moved prior to the closing date of New FamilySearch.)

However, the only birth, christening, death and burial data which are moved from New FamilySearch to Family Tree are the birth, christening, death and burial data which appear on New FamilySearch Summary screens.

Unfortunately, the Summary screens in New FamilySearch do not always reflect the most accurate birth, christening, death and burial data. Also, there are some instances in which historical records provide conflicting data in these matters, but only one set of data can appear on the Summary screen.

So there are instances in which birth, christening, death and burial data should be manually copied from New FamilySearch to Family Tree. In some instances, that data should replace the birth, christening, death or burial data in Family Tree (in the ancestor’s Vital Information section). In other instances, in which there are conflicting data, the second set of data should be preserved in a Discussion or as a Custom Event.15

As Chapter E suggested, it is best to keep both Family Tree and New FamilySearch open simultaneously in separate windows in your browser to accomplish this task.

This needs to be done urgently, prior to the closing down of New FamilySearch. Because of the short window of opportunity for this task, I suggest you do this for all of the portion of your family tree which you plan to clean up, prior to beginning Steps 6 - 18. (Please see Step 4 to determine the portion of your family tree which you should clean up.)

15Custom Events are located in the Other Information section of a person’s Details Page. To create a Custom Event, go to the person’s Other Information section and click Add. That gives you a menu of various events you can add (Alternate Name, Residence, Religious Affiliation, etc.). The last event on the list is Custom Event. Click on it, and a pop-up screen will appear in which you can chronicle the data you want to preserve. Be sure to explain your Reason well. As an example, if you want to chronicle conflicting birth data, in the Title box type Alternate Birth Data, in the Description box give the alternate birthdate and birthplace, and in the Reason box, give your source and why you believe the source should be considered. Perhaps you know the source is wrong, but it still is a historical record and therefore should be recognized and analyzed. There are a lot of erroneous historical records; we need to attach all sources (even erroneous sources) and then analyze them and prioritize them in order of what we believe is true.
Step 6. Make sure your ancestors’ records are not hijacked records.

A hijacked record is a record which has comingled data pertaining to two or more distinct people. It is a comingled record which can’t be resolved through Unmerge because it was brought forward from New FamilySearch comingled. Some hijacked records originated in the Four Generations Program, Ancestral File, or Pedigree Resource File (records which were considered “hard-wired” in New FamilySearch). Others were created in New FamilySearch through improper combining. (FamilySearch doesn’t call an improperly combined record a hijacked record, but it has the same effect in Family Tree. But when you are communicating with FamilySearch Support, make a distinction between a hijacked record, which was created before New FamilySearch, and a record which was erroneously combined in New FamilySearch.)

Records which were improperly combined in New FamilySearch could be separated, but when they were brought forward into Family Tree, that capability was lost.

Hijacked records and erroneously-combined records can be addressed through a dirty resolution or through a clean resolution.

Dirty resolution: You simply delete all the data and relationships pertaining to one of the fused people in the record, leaving genealogical data and relationships for only one of the persons. The problem with the dirty resolution is that you don’t know whose temple ordinances will remain with the person left standing. Temple ordinances which were performed for the deleted person might end up attached to the person left standing, resulting in a corruption of the temple ordinance data. To address this possibility, FamilySearch needs to display the full temple record for each ordinance: the name, genealogical data and family relationships which were submitted for the performance of the ordinance. That would allow us to review the data to ascertain whether the ordinances pertain to the individual left standing. And that means we need to see the data submitted for all the duplicate ordinances also.

Clean resolution: Send a Feedback email to FamilySearch Support. (See Document 106612 in the Help Center.) But first, it would be good to attach source records for the individual you want to remain in your family tree and also identify the URL’s (web addresses) for sources of the other fused individual(s), so you can prove they are distinct individuals. That might be a lot of work, but it is the only way to properly prove the record is hijacked, except in blatant cases. In your email, provide the PID of the record in question, your Contact Name, your Relationship, your Date of Birth, and your Helper Access Number.

As long as New FamilySearch remains open, it would also be good to go inside the Combined Record and determine which individual records pertain to each of the fused individuals, and include the PIDs of these records in your Feedback email.

There is urgency to this task, as records can only be separated by FamilySearch Support until New FamilySearch is discontinued. After that, the task will become more difficult.
IOUS

An IOUS (Individual of Unusual Size) is a New FamilySearch Combined Record with more than 250 individual records inside it. There are approximately 1 million IOUS in Family Tree. FamilySearch had no idea of the extent of duplication in the databases which were used to create New FamilySearch. Particularly, in the Pedigree Resource File, hundreds of descendants of an early LDS pioneer or of an early American settler submitted records of the same ancestor in their GEDCOMs. The resultant Combined Record for each of these individuals became so large that the New FamilySearch computer program could not deal with these large records. So the IOUS remained in New FamilySearch in a moribund state.

Unfortunately, nearly all the IOUS grew through improper combining. They started off as hijacked records in the Four Generations Program, Ancestral File, or Pedigree Resource File, and then grew like snow balls rolling down a hill in New FamilySearch.

Nothing could be done about the IOUS in New FamilySearch, but Family Tree will address the problem. FamilySearch plans to “blast” the IOUS, chopping them up into many smaller records, which we will need to analyze to separate out the hijacked individuals and then merge the records for each individual back together. FamilySearch plans to do the “blasting” sometime in 2013.

Steps 5 and 6 are urgent because they need to be completed before New FamilySearch is discontinued. So do Steps 5 and 6 for all of the ancestors whose records you plan to clean up, before moving on to Step 7.

After you have completed Steps 5 and 6 for your ancestors, do Steps 7 - 12 for each ancestor before moving on to another ancestor.
Step 7. Merge records for your ancestor.

There is still a large amount of duplication in Family Tree, and you can’t know whether a person’s temple ordinances have been performed until you merge all his records.

Family Tree’s search engine uses a different set of algorithms than New FamilySearch’s search engine, so records which did not show up as Possible Duplicates in New FamilySearch do in Family Tree.

To begin, click Possible Duplicates in the upper right-hand corner of your ancestor’s Details Page:

This will cause the Possible Duplicates screen to appear:

In this case, there is one Possible Duplicate record. So, to determine whether we need to merge this record into our ancestor’s record, we click the blue Review Merge button in the lower right-hand corner. (Even if the Possible Duplicate doesn’t look like a match in this screen, review the record. Often, the record looks totally different when you get into the details.)

Clicking Review Merge brings up the Merge screen, which appears on the following page. The Merge screen is generally very long, so I can only show you the top portion of the screen. In the Merge screen, your ancestor’s record is shown on the left and the Possible Duplicate is shown on the right:
First, compare the two records to decide whether they are intended to represent the same person. If they are, then you compare each field and decide whether to keep the information on the left or replace it with the information at the right. In the above example, we would keep the name Luther Rebel Giles and reject the less complete name L.R. Giles.

In the case of Luther Rebel Giles, I was able to confidently decide to merge the two records because the wife was clearly the same person in both records.

The decision whether or not to merge two records is probably the most difficult decision you will make in Family Tree. I will give a few tips below, but I am also preparing a Video Tutorial about merging which will use several examples from my own family tree; in the video, we will walk through those examples to see how the data guides us to make our decision whether to merge the records.

**You Have 3 Options**

When deciding whether to merge records, you have 3 options:
1) Merge the records, or
2) Mark the records as “Not A Match,” which will cause the computer to stop showing the Possible Duplicate record as a Possible Duplicate for your ancestor, or
3) Don’t make any decision. Sometimes, you just can’t make a good decision, so it is best to do nothing in that situation.
**Use Family Relationships As Your Primary Guide In Merging Records**

Family relationships are the crucial element of Family Tree and the best guide to merging records. Birth and death data are helpful, but are of secondary significance. If the relationships are correct, the rest of the data is less important and can be corrected. Get the relationships correct, and everything else can easily be put into place.

**Tip:** As you are merging records, keep your PAF file open, so you can compare the Family Tree records with your PAF data.

**When Merging Records, Review All the Data You Can**

Merging records is generally the hardest part of working on Family Tree. So review as much data as possible.

When comparing records, in addition to looking at names, dates and places, do the following:

1) **Compare the PIDs (Person Identifiers) of the spouse, children, and parents.** If the PID of the spouse is identical in both the left-hand column and the right-hand column, then the spouse is the same person. (And, of course, the same is true in respect to children and parents.) What is the possibility that two Thomas Kinkaids would have been married to the same Mary White? Would Mary have married two men named Thomas Kinkaid? Not very likely. So, obviously the two records for Thomas Kinkaid are intended for the same person; perhaps some of the data is incorrect in one or both records—correct the erroneous data, but merge the records.

2) **Click on the person’s spouse, children and parents.** The PIDs may not match for the spouse, but she could still be the same person. So click on her name, which will bring up her Summary Card, then click on View Person, so her Details Page will appear. Compare her record to your ancestor’s spouse’s record (which you could bring up in a separate browser window). This will allow you to better determine whether the spouse is the same person. If the spouse is the same person, then you have the same situation as described in # 1 above. If the spouse is different, then you have to ask yourself whether your ancestor had more than one spouse.

Go through the same procedure of comparing children’s and parents’ records. Yes, this is more work, but it helps you make a better decision, and merge-or-not-merge is a critical decision in Family Tree!

3) **Look at Sources.** If either record has Sources, click on the Sources and view them to see whether there are additional details in the Sources which will help you with the merge-or-not-merge decision. Again, the more data you consider, the better the decision you will make.
4) **Read the Discussions for both records.** The Merge screen does not show the Discussions, but there may be a Discussion that sheds light on the Merge question. So, when I am considering a merge, I open two additional browser windows, and I copy the PIDs of both records and conduct searches for those two records in Family Tree and bring them up in the additional browser windows. (You can have Family Tree open in multiple browser windows. You can even have the same Family Tree record open in multiple browser windows.) And then I look to see whether there are any Discussions to consider in those records.

5) **Look at the Temple Ordinances.** Sometimes, I may be 96% certain that the two records pertain to the same person, but I am not fully certain. Then, I look to see whether temple ordinances have been performed in both records. (I find the temple ordinance data the same way as the Discussions, explained in #4 above.) If I merge the two records, and they both have temple ordinances performed, then one set of temple ordinances will be set aside. I don’t merge records containing temple ordinances unless I am at least 98% certain they are the same person. If no temple ordinances have been performed, then I feel greater freedom to merge the records. (In the worst case, if I err, I might cause some genealogical data to be lost from the Family Tree website, but I haven’t damaged temple ordinances.)

I always do #1 above. I do #2, #3, #4 and #5 when the decision is less clear.

**If you are not reasonably certain the records are intended for the same person, don’t merge the records.**

Sometimes it is very difficult to determine whether or not to merge two records. In the end, if you are not reasonably certain both records were intended for the same person, don’t merge the records. And don’t mark the Possible Duplicate as “Not A Match” if you are not absolutely certain.

You can always visit the decision again later, when you might have more information. Or, someone else might have more data and thereby be able to make a more-informed decision. In the end, someone created each record, so if you just don’t know what to do, let the person who created the record decide for whom he intended the record.

**Give a clear Reason why you are merging the records**

Before you can click the final *Merge* button, the computer asks you to type in a Reason for merging the records. Please give a detailed reason, so other patrons can understand what data prompted you to make the merge decision. In Family Tree, whenever you Edit or Merge or Delete data, you are prompted to give a Reason. If you provide detailed specifics, other patrons are less likely to undo your actions.

**Unmerge /Restore**

When you have finished merging records, the two original records will be archived. Other patrons can review your work, and if they disagree with you, they will be able to Unmerge the
records and thereby return the two records as separate records, exactly as they appeared before you merged them. For that reason, you should generally Watch records which you have worked on. (See Step 12 for an explanation of the Watch feature.) However, if any change is made to the record after the Merge, such as the name is edited or a source is added, then you cannot use the Unmerge procedure; instead you have to use the Restore feature.

**Not A Match.**

If, after you have clicked the *Review Merge* button and carefully reviewed the Possible Duplicate record, and you have determined that the Possible Duplicate record definitely is not your ancestor, then click *Not A Match* at the bottom of the screen:

![Not A Match button](image)

This will cause the Possible Duplicate record to no longer be listed as a Possible Duplicate for your ancestor. It will not appear when you view the Possible Duplicates screen, nor will it appear when any other patron views your ancestor’s Possible Duplicates screen.

This feature was built into Family Tree after numerous New FamilySearch patrons complained that they separated erroneously-combined records, only to discover that another patron came along later and re-combined the records.

The *Not A Match* feature is a powerful and beneficial tool, but please use it only when you are absolutely certain that the Possible Duplicate is not your ancestor. *Don’t mark a Possible Duplicate as Not A Match just because you can’t determine that it is a match.* If the feature is abused, we could lose it (just as we lost the ability to lodge a Dispute because many patrons abused the feature). *Not A Match* means you are absolutely certain the Possible Duplicate is not your ancestor.

If you are not sure whether a Possible Duplicate is your ancestor, don’t merge the record and don’t mark it as *Not A Match.* Just don’t do anything.

**Some records cannot yet be merged.**

IOUs (Individuals of Unusual Size) cannot yet be merged, but you will be able to work with them sometime in 2013. (See page G6a.) Also, two LDS membership records can only be merged by the Membership Dept. Procedures are being established to facilitate this.

**Additional Resources:**
*Webinar: Merging.*

**Remember:** Do Steps 7 - 12 for this ancestor before moving on to another ancestor.

G7e
Step 8. Attach Sources to the ancestor’s Family Tree record.

You can link source records from any website, but we should especially link the Indexed records in FamilySearch’s Historical Records Collection into our ancestors’ Family Tree records. And what about your family Bibles, photos, and documents you have at home? Soon, you will be able to scan your documents and photos and store them directly on Family Tree. Right now, you can upload photos to familysearch.org/photos and tag them to your ancestors in Family Tree. RecordSeek.com also has a utility for attaching photos to Family Tree records.

**Tip: Save Yourself Time By Bookmarking the Websites You Will Use Most Often**

You can save yourself a ton of drudgery work by Bookmarking (designating as Favorites) the websites and webpages you will go to most often to find source records.

First, make sure your Bookmark Toolbar (the Favorites Toolbar) is showing near the top of your web browser. (See below.) Instructions to display your Bookmark Toolbar are on page Gh8.

Next, bookmark the webpages you will use most often: Type the web address (see below). Then, to bookmark in Internet Explorer, Firefox, or Chrome, click the star.

Below, I have bookmarked FindAGrave.com, nFS, FamilySearch.org, censuses for 1850 - 1940, and FamilySearch’s records collections for Kentucky, North Carolina, Tennessee and for the U.S. When I want to look at any of these collections, I just open a new browser window and click the bookmarklet. (Use TreeConnect with websites other than FamilySearch. See page Gh8.)

**Attaching A Source Record To An Ancestor’s Family Tree Record**

An individual can have up to 1,000 sources attached to his Family Tree record. When you attach a source, you attach it to an ancestor’s record, not specifically to a name, nor an event (such as a birth or marriage). However, you can point out the important information in the source by creating Tags which indicate the source identifies a person’s name or gender or birth data or christening data or death data or burial data. You can also add a Note to the source link, to highlight the data you want to highlight.

**How To Attach An Indexed Source Record To An Ancestor’s Family Tree Record**

You should have the ancestor’s Family Tree record open in one browser window and FamilySearch’s Records Search open in another browser window.

When you find a record in Records Search which pertains to your ancestor, hover your cursor over My Source Box in the upper right-hand corner of the source record:
"United States Census, 1900," H L Lafayette Moody, ED 29 Jonathan Creek Township, Haywood, North Carolina, United States

That will cause a drop-down menu to appear; click Add To My Source Box. The record link, with its title, URL, and citation will be added to your Source Box. You can also attach a Note.

Then go to your ancestor’s Family Tree record and click Go to Source Box.

That will take you inside your Source Box. The most recently-added source will be at the top of the list of sources:

Next, click on Attach to the right of the source title.

Then the system gives you the opportunity to record why you believe this source record pertains to this individual. You then click Attach, and the system attaches the source record to that ancestor, with the source’s title, URL, citation, and your explanation why the source record pertains to that individual.

Thereafter, you and all other patrons will be able to readily access that source record and all other source records you link into your ancestor’s Family Tree record, just by clicking the logo in front of the source.
How To Attach A Source To Multiple Family Members in Family Tree

If a record contains information about several family members (such as a birth record, a marriage record, a census record, or a book), you can attach the record to all of the individuals mentioned in the record. First you add the record to your Source Box (as we saw previously). Then you can attach it to multiple family members from your Source Box by entering your Source Box from the various Family Tree records of the family members. Once inside the Source Box, you go through the same Attach process described above.

And you can add a different Explanation for each family member.

A Better Way To Attach A Source To Multiple Family Members

The above-described method works okay, but let’s look at a census record: You place Henry Lafayette Moody’s 1850 census record in your Source Box and attach it to him. Then you attach his census record to his wife and his census record to each of his children….Well, that’s really not best. You want to attach his wife’s census record to his wife, and the census record of each of his children to his children.

So FamilySearch’s idea of attaching the same source record to multiple family members generally isn’t best. You see, in most indexed records, even in birth and marriage records, every person listed in the record has his own individual link. Here is my grandmother’s birth record:
If you click on her father, this is how the same source record appears:

"North Carolina, Births and Christenings, 1866-1964," William Self Hughes in entry for Ethel Ida Hughes, 1900

And the same principle is true, of course, if you were to click on her mother’s name. So you get a distinct Title, URL, and Citation for each individual mentioned within the source record.
Now, I could spend a couple of pages explaining the long-term implications, but I will save you the drudgery and hope you trust me. Long-term, it is best to individualize the source record links. If you do it the fast-and-dirty way, someone will probably come behind you, erase all your source attachments, and re-do them the better way. So, let’s do it the best way from the beginning.

And it’s really not that hard to individualize the source record links. When you are in a source record, just click on each individual and send individualized forms of the source link to your Source Box, and then attach them to the various family members. It only takes a few seconds longer this way, and it will be much better.

**How To Conduct A Fruitful Search in FamilySearch’s Records Search**

Don’t expect to always find what you want in just one search. Be prepared to conduct a whole series of searches. Vary the parameters each time, sometimes broadening and sometimes narrowing your search parameters.

1. Give a range of years, even if you know the exact date. The source records may be off (census records, in particular, have incorrect ages).

2. If you get no satisfactory results, broaden your geographical location. (When a sibling has moved away to an unknown location, I sometimes enter the Given Name, Surname, the time frame, and use the Gender filter, and then use United States for the locality. Amazingly, I have often found my lost relative.\(^\text{16}\))

3. If you get too many potential matches, use the filters at the bottom of the search parameters to narrow the search by the person’s gender, or the geographical locality, or the time frame, or the type of record you are searching for, etc.

4. If you don’t get the desired results in a general search, select a particular collection of records to search. For instance, if you want a North Carolina marriage record:
   a) Go to the Records Search home page,
   b) Scroll down to *Browse By Location*, and then click on *United States*.
   c) That takes you to a list of 673 record collections for the United States. Click on the North Carolina list of collections.
   d) That narrows it to 17 collections. Select North Carolina marriage records.
   e) Now conduct your search. You will probably get a much better and more definitive listing of

\(^{16}\)Compare this to the traditional approach of searching records on microfilm. If you searched for an ancestor’s sibling who moved westward to an unknown state, you could have spent thousands of hours and still not have found the lost relative. With a digitally searchable database, made possible through the FamilySearch Indexing program, you might find the lost relative in just a few minutes!
potential matches than in a general search. The downside to this approach is that it takes longer, since you may need to conduct searches in several record collections. So conduct a general search first, and then search individual collections if you don’t find what you wanted from the general search.

5. Sometimes when I don’t get the results I want, I search solely on the surname. If the surname is a common surname (like Scott) and I know the Scott family lived in just two counties, I conduct two searches, one for each county, with the Scott surname but no given name and no other search parameters. If the surname is rare, like McGaha, I search on an entire state with just the surname. I often get great results this way, since my ancestors were often listed by nicknames (Shrug, Reb, Brave, etc.) rather than their real given names. Also, I get to see all the families with that surname in that county, and generally most of them are related to me as second or third cousins. When I do Descendancy Research, I always use this approach. (To learn about Descendancy Research, see Chapter I.)


**How To Attach A Source Record from a Website Other Than FamilySearch.Org**

FamilySearch’s Records Search has a streamlined process for attaching source records to Family Tree records. Some of the other major genealogical websites are considering imitating FamilySearch, because they want the business of Family Tree patrons. But with most websites, you are going to have to use a copy-and-paste approach for the URL and make up your own Title and Citation.

Before you attach source records from other websites, one of the considerations you must weigh is whether that website will exist years down the road. If it’s a large commercial genealogical website, then it probably will, but you also have to wonder whether it might change the URLs of its source records, which would similarly make the source links unuseable.

If you feel secure in this regard, then let’s proceed to the mechanics of attaching a source record from a website other than FamilySearch.org:

1. Open your ancestor’s Family Tree record in one browser window, and the source record in a separate browser window.

2. In your ancestor’s Family Tree record, click on Create A New Source.

3. The Create A Source screen will appear, with four boxes:
Create a Source
Identify the record you have found. This will be called a "Source."

Source Title (Required)

Web Page (Link to the Record)
Example: http://www.uk1841census.com/census_online.htm

Where the Record Is Found (Citation)
Dwelling address. Federal archive. Digital Image

Describe the Record (Notes)
Census 1841 Father: Robert Smith. Mother: Helen Strachen. Children:
Hugh Sidley Smith, Robert Smith.

Save   Cancel

a. Make up a Title for the source which you and others will understand.
Example: Family Bible of Nathaniel M. Giles, 1857, Cocke, Tennessee.

b. Go to the browser window where the source record is located. You will copy-and-paste
the URL of the source record into the second box of the Create A Source screen.

c. Make up a Citation for the source record and type it in the third box. Always include the
date you accessed the source record.

d. Add any Note you feel is pertinent. Then click Save.

e. You will be given the opportunity to type in a reason why you feel this record pertains to
this individual. Then confirm that you are attaching this source record to this individual.

And voila! You have attached the source record to that ancestor’s record in Family Tree.

An Easier Way to Attach Sources from Websites Other Than FamilySearch

Now that you’ve learned the hard way to attach sources from websites other than FamilySearch,
let me show you the easy way—with Tree Connect, at RecordSeek.com. It’s a FamilySearch
Affiliate which automates the time-consuming process described above.

G8g
**How To Download Tree Connect**

1. Make sure the Bookmark Toolbar is visible in your internet browser. If it isn’t, first make sure you have the most recent version of your browser. Then:
   a. Internet Explorer: Right-click just to the right of the New Tab button. Then click **Favorites bar**.
   b. Firefox: Right-click on the Star (generally in the address field). Next, click **Bookmarks Toolbar**.
   c. Chrome: Click on the Wrench. Next, click on **Settings**. Then, click on **Always show the bookmarks bar**.
   d. Safari: Click on the Wheel. Next, click **Show Bookmarks Bar**.

2. Go to [www.RecordSeek.com](http://www.RecordSeek.com). Then, drag the green *Tree Connect* button to your Bookmark Bar. (It’s easy, and you only need to do this once.)

   ![Tree Connect button](treeconnect.png)

**How To Use Tree Connect**

When you find a source you want to attach to a Family Tree record, from any website:

1. Highlight the data in the source. The highlighted data will be placed in the Notes section (the 4th box of the Create A Source screen shown on the preceding page). This is helpful in case the URL is changed years later; the data will still be preserved in the Notes.

2. While still viewing the source, click the *Tree Connect* bookmarklet in your Bookmark Bar.

3. FamilySearch’s sign-in screen will appear. (It is brought up by Tree Connect.) Sign in. You only have to do this once per session, no matter how many records you attach.

4. The Create A Source screen will appear with the Title generated by Tree Connect, the URL, the Citation generated by Tree Connect, and the Notes copied from the source’s data.

5. In the Notes, you will see an advertisement for Tree Connect; please delete it.

6. Click the *Save* button. The source is now saved in your Family Tree Source Box.

7. Tree Connect then gives you the opportunity to search for your ancestor in Family Tree. That is generally not necessary, so just disregard the search window.

8. Go to your ancestor’s Family Tree record. Click *Go To Source Box*. The newly-added source should be the first source listed. Click *Attach*, and the source is attached to your ancestor’s Family Tree record. (If it is a marriage record, enter the Couple Relationship screen to enter the Source Box, so the marriage record will be attached in the Couple Relationship screen, and thereby be viewable from both the husband’s and the wife’s record, as explained below.)

G8h
**You Can Attach Sources in 3 Locations on an Ancestor’s Record**

There are 3 locations on an Ancestor’s Record in Family Tree where you can attach a Source:

1) the main Sources section

![Image of the main Sources section]

2) the Sources section in the Couple Relationship screen

![Image of the Couple Relationship screen]

3) the Sources section in the Parent-Child Relationship screen

![Image of the Parent-Child Relationship screen]

You must enter the Source Box from the correct location in the Ancestor’s Record in order to ensure the source is attached where you want it.
**How to Tag Sources**

You can *tag* a source to show the source provides historical evidence supporting your conclusion. As an example, you might tag a birth record to show the proper spelling of the person’s name. Tagging sources is especially beneficial when there have been conflicting opinions. It is less likely that another patron will change your contribution if you have shown that a historical document clearly supports your conclusion.

To tag a source, first click on the source in your ancestor’s Details Page. Then click *Tag*. That causes a drop-down menu to appear, in which you can check which field(s) you want the source tagged for:

![Tagging menu example](image)

Now, in his Vital Information section, when you click on his Death data, you see the tagged source:

![Tagged source example](image)

**Sources Which Mention Living Persons**

You may run across source records which mention individuals who are still living. Please be sensitive to this. Privacy laws protect the identity of living persons, and it is imperative that all patrons obey the privacy laws. We should also respect copyrights.


**Remember:** Do Steps 7 - 12 for this ancestor before moving on to another ancestor.
Step 9. Clean your ancestor’s record in Family Tree.

You can clean up other contributors’ erroneous contributions in Family Tree!

Names

Family Tree displays all the forms of the ancestor’s name which appeared in New FamilySearch. You can correct or delete erroneous forms of the ancestor’s name. You should ensure your ancestor’s name appears in the best form in the Vital Information section of his Details Page. However, sometimes it is wise to leave erroneous names in the Other Information section.

For instance, one of my ancestors was listed with a totally incorrect name in the 1880 census, and someone had submitted the ancestor under that name. Rather than deleting the erroneous name, I added an explanation to the name: that the person had been listed by this name in the 1880 census but she had never personally used that name. My reasoning was this: if a later researcher were to see the 1880 census and look for her in this family in Family Tree, he would think we had inadvertently left that child out, and so he might create a record for her under that name. However, with the name listed in her Family Tree record as an Alternate Name, with the explanation given above, the researcher will know not to create a new record using that name. It might also be wise to create a Discussion about that alternate name.

Gender

You can now correct a person’s gender if the record shows him unmarried and he has not received temple ordinances. If he has received temple ordinances, refer to page H1.

Birth, Christening, Death, and Burial Data

The only birth, christening, death, and burial data in Family Tree is that which appears on the ancestor’s Summary screen in New FamilySearch. That is why, in Step 5, you reviewed your ancestors’ New FamilySearch records to see whether you needed to manually transfer some of the birth, christening, death and burial data to Family Tree. You can edit or delete any of the data in Family Tree.

Marriage Data

Family Tree displays all the marriage data (dates and places) listed in New Family Search. You can edit or delete this data.

To review and edit marriage data, you need to enter the Couple Relationship screen. To do so, scroll down to the Family Members section of either the husband’s or wife’s Details Page. Then click Edit Couple.
Parent-Child Relationship

Don’t forget to go into the Parent-Child Relationship screen. That’s where you record whether this was a biological or adopted or guardian or step child of the parents. To enter the Parent-Child Relationship screen, scroll down to the Family Members section and hover your cursor over the child’s name. That will cause an Edit Relationship button to appear, similar to the one above. Click Edit Relationship and you will enter the Parent-Child Relationship screen.

Erroneous Family Relationships

You can delete husband-wife relationships and child-parent relationships, including those created by other patrons, in Family Tree. Also, if only one parent in a child-parent relationship is incorrect, you can remove the incorrect parent. This is a huge step in your ability to clean up the really messy portions of your family tree! Go to pages H2 - H3 to see how to make these corrections.

Discussions

New FamilySearch’s Discussions are in Family Tree. You can edit yours. Since we can now edit other contributors’ contributions, many old Discussions and Disputes should be deleted.

Notes, Sources, and Other Events

New FamilySearch’s Notes, Sources, and Other Events have not yet been transferred to Family Tree, but will be transferred soon.

You can edit Family Tree’s Sources. And hopefully you will add to Family Tree’s sources by linking source records into your ancestors’ records at Family Tree, as discussed in Step 8.

Wise family historians use the Notes fields extensively, both in their PAF file and on Family Tree (once the Notes feature is activated). You can place anything of genealogical value in the Notes field that doesn’t fit in the standard fields.

How To Correct Data in Family Tree

Click on the data you want to correct, and an Edit button and a Delete button will appear.

Whenever you edit or delete data, you should give a specific explanation for doing so. Please make these explanations meaningful. Mention sources or tag sources to the data to support your conclusion. It is less likely that other patrons will un-do your work if you back up your conclusion with sound reasoning, explained in clear terms that will be understandable to other patrons (not just to you), and supported by sources.
Names: Standardization

Identify the name parts as Title\textsuperscript{17}, First Names, Last Name, or Suffix. (Jr. and Sr. are suffixes.) This allows Family Tree’s search engine to treat the name correctly.

In addition to the Standard name Template, Family Tree accommodates Spanish, Portugues, Cyrillic, Chinese, Japanese, Khmer, Korean, Mongolian and Thai names in their native alphabets.

Standardized Places and Dates

It is very important to utilize standardized places and dates, so the search engine will understand your data correctly. To do so, use the drop-down menu which will appear when you begin typing a place or date. As a general rule, always select an item from the drop-down menu.

Occasionally, though, the drop-down menu lacks the specific location you want. But if the first location in the drop-down menu is correct (though not as specific as the location you know), then don’t select from the drop-down menu. If you don’t select from the drop-down menu, the computer selects the first-listed location as the standardized place, which, in the afore-described instance, is the best location on the standardized list.

If the computer shows no standardized date or place, then the computer reads nothing in that field!

\textsuperscript{17}You can enter a person’s title, such as Count or Colonel or Doctor or Reverend, either in the Name field in the Vital Information section, or as part of an Alternate Name in the Other Information section.
**Follow the guidelines for entering names, dates and places**

New FamilySearch had very specific guidelines for entering names, dates and places. Family Tree lacks published guidelines but utilizes those which were used in New FamilySearch.

The guidelines are given in Appendices A, B and C of *A User’s Guide To The New FamilySearch*. These guidelines are largely different from the guidelines we used to use in PAF; they are designed to accommodate the search engine. You should have a copy of the guidelines, learn them, and use them. (Thanks!)

**Trouble-shooting:** Chapter H explains how to resolve incorrect gender, incorrect sealings, incorrect relationships, perpetual loops, twins, and children in the same family with the same name. Step 6 addressed hijacked records.

**Additional Resource:**
- *Correcting Information about a Person*, a 4-minute video. Does not run on Firefox.
- *Correcting Family Relationships*, a 5-minute video. Does not run on Firefox.
- **Webinar: Editing Relationships.**

**Remember:** Do Steps 7 - 12 for this ancestor before moving to another ancestor’s record.

**Step 10. Repeat Steps 7 - 9.**

After you have merged your ancestor’s Family Tree records, attached Sources, and cleaned his record, it is possible that the Family Tree search engine might find additional Possible Duplicates for your ancestor (since the data in his record is now changed).

So, you need to go back and click on Possible Duplicates again. If there are no new Possible Duplicates, then you can move on to Step 11. But if the search engine has found new Possible Duplicates, you need to address them. And if you end up merging additional records, you might have new information that would help you find new Sources. And that might cause you to need to do a little additional cleaning of your ancestor’s record.

G10a
Step 11. Create Discussions concerning the ancestor, and update or delete old Discussions and Disputes.

On your ancestor’s Details Page, below the Sources section, is the Discussions section. In this section, you can:
1) read Discussions created by others,
2) add Comments to Discussions created by others, or
3) create a new Discussion about the person.

The idea is to encourage greater communication among the descendants of a common ancestor. You can utilize the Discussions feature for various purposes:

1) You can discuss research issues about the person. Other patrons might add Comments to your initial Discussion, which might help you overcome research roadblocks.

2) You can coordinate research efforts with other patrons. Ideally, each of us should carve out a small niche of the family tree to research intensively. Each researcher should have a different niche. Then we should all share our researching findings with everyone, through Family Tree. Through well-coordinated collaboration, we will achieve far more than we have in the past.

3) You can question data provided by other Contributors and explain why you believe certain data may be more accurate.

4) The Discussions feature is great for debunking erroneous family traditions. Describe the erroneous family tradition and then explain why it is incorrect. The Discussion serves as a red flag to your relatives to not enter the incorrect family tradition onto your ancestor’s record nor to continue relying on it. Hopefully over time this will kill off many erroneous family traditions.

5) You can provide biographical information about the person which doesn’t fit in the standard fields. (You can also do that in Notes when the Notes feature is added to Family Tree.)

Be sure to cite your sources when you create a Discussion or add a Comment to a Discussion. Other patrons will believe you more readily if you can cite a good source.

Legacy Disputes: Between about 2008 - 2010, New FamilySearch had a Dispute feature, in which patrons could dispute the contributions made by other patrons. The Dispute feature was discontinued because it was over-used. (I even saw one patron dispute his own Dispute.) Now that we can edit other patrons’ contributions, the contents of nearly all Disputes are now irrelevant. So, please delete your old Disputes, which Family Tree calls Legacy Disputes. Nearly all Legacy Disputes are now dead wood cluttering your ancestors’ Family Tree records.

Tip: If any of your Legacy Disputes are still valid, delete them and create new Discussions. No one will read the Legacy Disputes. Creating a new Discussion gives you a headline that patrons will notice.
Tip: You can create more than one Discussion concerning a person, so if you have two unrelated issues, it is better to treat each in a separate Discussion. (Mingling unrelated issues makes the Discussion confusing, particularly when other patrons add Comments to your Discussion.)

Tip: Since Family Tree will be available to the general public, please discuss temple ordinances through emails rather than Discussions or Notes.

Tip: Keep a log of people for whom you created Discussions, so you can periodically update or delete the Discussions when they are resolved. (Record the name of the ancestor, his PID, and the date you added the Discussion or Comment.)


Remember: Do Steps 7 - 12 for this ancestor before moving on to another ancestor.
Step 12. Add your ancestor to your automatic notification system (the Watch feature).

In the upper right-hand corner of your ancestor’s Details Page, you will see a Watch button. It is a toggle button, so if you click the button, it will now say Unwatch. When the Watch feature is off, it reads Watch; when it is on, it reads Unwatch. (When it says Unwatch, you are watching changes to this person’s record. When it says Watch, you are not watching the changes to the person’s record.)

As a general rule, you should Watch the records of all persons who are in your PAF database, and you should not watch the extended lineages which are not in your PAF database. Again, as explained in detail in Step 4, your PAF database should represent your personal research niche, while Family Tree is a broader, collaborative research database. Your PAF database should only contain those nuclear families which you have personally researched or you are currently researching. (Please do NOT copy all the extended lineages from Family Tree to your PAF database, or you will create havoc for yourself.)

Thus, you should Watch the records of those persons whom you have personally researched or you are currently researching, but please do NOT try to Watch your entire Family Tree ancestry, which presumably includes many people whom you have never researched. If you Watch your entire Family Tree ancestry, you will be inundated with notifications of changes to records of persons which will be meaningless to you.

When you have toggled the Watch button on for the records you wish to Watch, you will receive one weekly email notifying you of changes which have been made to the records you are Watching. For each record which has been changed during the preceding week, you will see a Record link in the email. If you click on that link, it will take you to that person’s record in Family Tree, so you can review the change(s) which have been made to the person’s record.

Previously, the notifications did not reflect all the types of changes which can occur in a record; I am of the understanding the notifications now do reflect all changes made to the record.

The automatic notification system is a tremendously important tool to help you maintain a vigil over your ancestor’s records in Family Tree. Occasionally, the notifications will include a research breakthrough.
**The Importance of the Watch Feature in Family Tree**

While it is great that you can edit the erroneous information in Family Tree contributed by others, it also means other patrons can edit your information. There will be a lot of changes made in your ancestors’ records in the next few months, so it is important that you are using the Watch feature.

Any record that you marked to Watch in New FamilySearch will be under the Watch feature in Family Tree.

In Family Tree, changes are listed in the upper right-hand corner of the ancestor’s record and on your Watch List.

![Watch Feature in Family Tree](image)

Sometimes, through the Watch feature, you will become aware of changes made to your ancestors’ records with which you do not agree. If you have Sources which demonstrate that these changes are erroneous, then it is proper for you to take corrective action. However, please do so in a kind, loving, and understanding spirit. The patron who erred did not do so maliciously; he was trying to help—please remember that!


Perform Steps 7 thru 12 for an ancestor before proceeding to another ancestor’s record.
Do Steps 13 and 14 for a nuclear family before moving on to another nuclear family.

**Step 13. Search for missing family members.**

If Family Tree is missing a member of the nuclear family you are working on, you should search for a record for the person and link the person into his/her family.

**Always search for an existing record before considering creating a new record.**

Below is the *Add Or Find Person* screen:

![Add Or Find Person screen](image)

By default, the screen wants you to first try to find an existing record of the person. If you can’t find an existing record for the individual, then you can *Add* a record for him.

Because of the privacy laws, you can search for a deceased person, but you cannot search for a living person in Family Tree.

If you find an existing record in Family Tree’s database for the missing family member, link the
record into your family tree even if some of the data may be erroneous. Remember what we said about merging records; the same principle applies here—if the record was intended to represent your ancestor, link the record into your family tree. Otherwise, you will create an unnecessary duplicate record, and you will run the risk of duplicating temple ordinances which may already be recorded on an existing record in Family Tree. If the record was clearly intended to represent your ancestor, link the record into your family tree and then correct the erroneous data.

Also, you will want to perform Steps 5-12 for the person, so please go back and do those before moving on to another person.

**Tip:** If you can’t find a record, re-try with less info in the search screen (perhaps just the name and birth year), for a broader search. Also try name variations, etc.

**Where to Add People in Family Tree**

You can search for and add a person in the following locations:

1) Add Parents at the end of a lineage in your pedigree chart.

2) Add a Spouse or Parent in a person’s Details Page, in the Family Members section.
3) Add a Child in a person’s Details Page, at the bottom of the Family Members section.

![Add Child button](image)

You can also search for a person at the Search tab at the top of the screen. (You can find the record from the Search tab but you can’t link it into your family, since the computer won’t know where to link the record.)

Further Search Tips are available on page L2.

**Biological and Adopted Relationships**

You can show a child as a biological, adopted, or step child or under a guardianship. You can show one type of relationship to the father (such as biological) and another type of relationship to the mother (such as adopted). To create or edit these relationship types, you need to enter the Parent-Child Relationship Screen. To do so, go to the father’s or mother’s Details Page, scroll down to the Family Members section, hover your cursor over the child’s name, and you will see an *Edit Relationship* link appear. Click it, and you will enter the Parent-Child Relationship Screen.

**Additional Resource:**
*How Do I Find and Add a Name to Family Tree?* (Handout)

Do Steps 13 and 14 for a nuclear family before moving on to another nuclear family.

Never reserve names for the temple without first ensuring all the records for the person have been merged. Otherwise you don’t know whether the ordinances have already been performed.

Where You Can Find Temple Ordinance Data at Family Tree

Temple Ordinance Data is located in three locations on the Family Tree website:

1) In the ancestor’s Details Page, at the bottom of the screen. This gives the status of the person’s temple ordinances. If they are completed, the temple and date are listed.

2) In the pedigree chart, if you hover your cursor over a person, you can see the temple icon:

- A check mark means all the family’s ordinances have been completed.
- A green arrow means ordinances for someone in the nuclear family have not been completed.
- A caution sign means more data is needed or someone in the nuclear family has not been deceased for a year.
- A padlock means all the remaining ordinances for the family have been reserved.
3) By clicking *Temple* at the top of Family Tree screens:

This takes you to a screen which lists the individuals whom you have reserved for temple ordinances. At this screen, you can print the Family Ordinance Request to take to the temple.

**How to Reserve Temple Ordinances**

After you have worked on the family’s Family Tree records, and you are comfortable that the names, genders, and family relationships are correct, then go to the pedigree chart. If there is a green arrow above the parents, then there are temple ordinances which can be reserved for that nuclear family.

Click on the green arrow. That will open a screen which shows for whom ordinances can be reserved. Check the boxes by the individuals for whom you want to reserve ordinances, and then click *Continue*.

That will open a screen explaining some of the major Church Policies. Please review the policies and complete the portion at the bottom of the screen. When you click *Add To Temple Ordinance List*, the individuals whom you selected will be reserved for you. Once you have reserved names, no one else can reserve them, to prevent duplication.

An alternate entry for reserving temple ordinances is on the individual’s Details Page, in the Temple Ordinances section:

**List of Reserved Names**

When you click the *Temple* tab at the top of the Family Tree screen, a screen opens which lists all the people whom you have reserved for temple ordinances. For each person in the list, the screen indicates the status of each ordinance (Baptism, Confirmation, Initiatory, Endowment, Sealing to Parents, and Sealing to Spouse).

This screen also allows you to reassign ordinances to the temple (to be performed by other temple patrons) by clicking *Reassign* under your name. You can also re-assign them back to yourself. The screen also allows you to *Unreserve* a person.
When you are ready to take names to the temple, you print a Family Ordinance Request (FOR). To print an FOR, check the boxes in front of the names whom you wish to include in the FOR (shown above). You can include up to 50 people in one FOR. Then click the Print or Reprint Request button (also shown above). A PDF file will open, from which you can print the FOR. Or you can save the FOR to your hard drive and then send it as an email attachment to a relative, to let him do the ordinances. If you have lost the FOR, you can reprint it by the same means.

The FOR contains a barcode, which the temple’s family file department will run under a barcode reader, which will identify the print request from the Family Tree website. From that, the blue, pink and off-white ordinance cards will be printed.

Perform Temple Ordinances in Order

Please perform the temple ordinances in their correct order: Baptism, then Confirmation, then Initiatory, then Endowment. After both husband and wife are endowed, they can be sealed. Children should be sealed to their parents only after the parents have been sealed together. (If, in the past, ordinances were performed out of order, they are not invalid, but the subsequent ordinances did not take effect until the prerequisite ordinances were performed.)

You Can See Who Reserved Names for Temple Ordinances

You can see who reserved an ordinance by looking at the Temple Ordinances section of the person’s Details Page. If you need to contact the patron (if you know the ordinances have been done or should not be done) and he has provided his email address, you can email him.

Please obey Church policies concerning submission of names for temple ordinances.

Two of the most prominent policies are:
1) if the decedent was born in the past 110 years, you must obtain permission from the closest living relative to perform temple ordinances, in order to respect the wishes of the family.
2) do not submit names of celebrities or Holocaust victims who are not your close relatives.

Church policy states: “Please perform ordinances only for people to whom you are related. The only exception would be for a close friend whose closest living relative has given permission”.

Widespread violation of Church policies could turn public sentiment against the Church. The vicarious baptism of President Obama’s mother in 2009 caused bad press for the Church.
Do not surf the pedigree chart looking for “Ready” records if you know virtually nothing about the individuals.

When New FamilySearch was released, many patrons surfed the pedigree chart reserving any name which said “Ready.” Many of the temple ordinances which were performed were either duplicate ordinances or invalid ordinances.

FamilySearch correctly surmised that the term “Ready” was poorly chosen; the current term is “Request,” which is much more appropriate.

Why you should never “surf the pedigree chart” indiscriminately:

1) You don’t know whether the records for the individual have been merged yet. If they haven’t, the temple ordinances may have already been performed.

2) Many of the records in Family Tree represent preliminary research. In some cases, the individuals never existed; in other cases, the gender is wrong; in other cases, family relationships are incorrect.

Irrespective of whether a record says it is ready to “Request,” if you are going to take a name to the temple for sacred eternal ordinances, you have the moral responsibility to determine either by your own personal research or by the research of someone you trust that 1) the individual did exist, 2) the gender is correct, and 3) the relationships to be sealed are correct.

Don’t resubmit names for temple ordinances just because names were spelled wrong or birth dates or places were off.

We baptize people, not birth dates, not birth places, nor even names. Prior to New FamilySearch, we attempted to identify an individual in time and space—with a birth date and birth place. New FamilySearch and Family Tree take a totally different approach—they are relationship-based. In effect, we have returned to the old Biblical pattern: Adam begat Seth, who begat Enos, who begat Cainan, who began Mahalaleel, who begat Jared, who begat Enoch. The Bible never gave birth dates or birth places—that data wasn’t really important. What was important was the relationships, and that is the basis of Family Tree. If the relationships are correct, the birth dates and birth places and even the name variations can be substantially wrong without invalidating the ordinances.
A User’s Guide To The New FamilySearch Website addressed the question: “Do Minor Errors in Names or Event Information Make an Ordinance Invalid?

“Minor errors of information do not affect the validity of ordinances.

“Ordinances for the dead become effective when the deceased person is qualified and chooses to accept them (see D&C 138:19, 32-34). Ultimately, the validity of all ordinances is decided beyond the veil. We can only do our best to give our ancestors the opportunity to receive ordinances.

“You can correct the information about the individuals in the [Family Tree] Web site, but you do not need to perform the ordinances again. For example, ordinances are still valid and sealings are still in effect, even if an individual’s birthday is wrong, or a name is misspelled, or a place of death is wrong. The individual’s genealogical record can be updated with the correct information.”

A User’s Guide To The New FamilySearch Website defined “When Do Ordinances Need to be Performed Again? Ordinances need to be redone and another record recorded only under a few circumstances.

“Individuals were sealed to the wrong spouse or parents.
“Proxy ordinances were performed for the wrong gender.
“Proxy ordinances were performed in error while the individual was still alive.
“Proxy ordinances were performed before the one-year anniversary of the individual’s death.”

But if the individual was deceased (for over a year) and the gender and family relationships are correct, and the only concerns are name variations and dates and places, you should not re-do the ordinance if the person for whom the record was intended can be identified with reasonable certainty. Go ahead and correct the information, but don’t re-do the ordinances.

Changes to Temple Qualification Rules, Effective December 2009

1. In addition to the other data required for temple ordinances to be performed, a person’s record must have a standardized place of birth, christening, marriage, death, or burial. The Place name must contain at least a country. Beginning in 2011, the event must also have a date.

2. Quotation marks (""), parentheses ( ), and slashes (/) can no longer appear in the Name field. Numbers can appear in the name only if they are a Suffix. (Select a name for the Vital Information section of the Details Page which does not have these marks. Nicknames and alternate forms of a name should be placed in Alternate Name fields. See Step 9.)
The 95 Year Rule Has Become a 110 Year Rule

In March 2012, the First Presidency revised the 95 year rule; it is now a 110 year rule:

“Before doing ordinances for a deceased person born in the last 110 years, please remember that close relatives may not want the ordinances performed, or they may want to do the ordinances themselves.

“You may do ordinances for your own deceased spouse, child, parent, or sibling, but please consider the wishes of other close living relatives, especially a living spouse.

“If you are not a spouse, child, parent, or sibling of the deceased, please obtain permission from the closest living relative before doing the ordinances. The closest living relatives are, in this order: an undivorced spouse (the spouse to whom the individual was married when he or she died), an adult child, a parent, or a brother or sister.

“Verbal approval is acceptable. Family members should work together to determine when the ordinances will be done and who will do them.”

Make Sure the Data Is Correct Before You Print an FOR

The person’s name and birth data that will go to the temple are the data in the Vital Information section of the person’s Details Page. For that reason we clean the record (Step 9) before reserving names (Step 14). You can still correct the person’s Details Page after reserving the name, but before printing the FOR.

“Needs More Information”

You cannot perform temple ordinances if the temple status is “Needs More Information.” However, the needed information may be in the record, but the computer cannot read it properly. Parentheses in a name or a place that is not in the standardized places list are examples. Page 156 of Using the FamilySearch Family Tree: A Reference Guide (LDS Version) gives more details.

Temple Ordinance Statuses

Request – You can take this ordinance to the temple if you follow Church policies. Be sure the gender is correct and the family relationships are correct.

Request (Permission Required) – The person was born in the past 110 years, so you must get permission from the closest living relative, in order to perform the ordinance.

Waiting – Ordinances should be done in order, i.e. baptism before endowment. An FOR has
been printed for the prior ordinances, so the later ordinances are on hold until the
prior ordinances are completed.

Printed – You reserved the ordinance, and the family ordinance card has been printed. The
ordinance is not yet done. Other users will see this ordinance with the status of
“Waiting and reserved by [your Contact Name].”

Not Printed – You reserved the ordinance, but the family ordinance card hasn’t been printed.
Other users will see this ordinance with the status of “Waiting and reserved by
[your Contact Name].”

Not Available – The person’s ordinance information is not made public. Common reasons:
For privacy reasons, Living Persons’ ordinances cannot be seen.
Ordinances for people born before 1500 AD have generally been completed but
are not made public.
Additional approvals are required for performance of the person’s ordinances.
If you have questions, contact FamilySearch Support.

Not Needed – This person does not need this ordinance because he was either born stillborn or
died before age 8.

Born in the Covenant – Sealing to parents not needed, since he was born after his parents were
sealed.

Needs More Information – This person needs more information or the information needs to be
corrected.

Not Ready – One year has not passed since the person’s death. Please respect the wishes of the
closest living relative.

Completed – The ordinance has been performed.

Additional Resources:
Policies for Submitting Names to the Temple, a 5-minute video. Excellent. All LDS should view.
Reserving Ordinances in Family Tree, a 3-minute video. Does not run on Firefox.
Assigning Names to the Temple in Family Tree, a 4-minute video.
I Want to Share Names with Others, video.

Do Steps 13 and 14 for a nuclear family before moving on to another nuclear family.

Complete Steps 5-14 for the portion of Family Tree which you plan to clean up.

Thereafter, do Steps 15-18 for the same portion of the family tree.
Step 15. Make the necessary preparations for Synchronizing your PAF file with Family Tree.

Synchronization will allow you to selectively upload (copy) data from PAF\(^{18}\) to Family Tree and to selectively download (copy) data from Family Tree to PAF.

Preparatory Steps Preceding Synchronization

Before you can synchronize, you must:

1) Merge the records for your ancestors in Family Tree. (You did this in Step 7.)

2) Be sure you utilize standardized places (and standardized dates) for all data you key into your ancestors’ Family Tree records. Also, if you include titles in names in Family Tree, be sure to designate that portion of the name as a title. (You did this in Step 9.)

3) Now you need to prepare your PAF file by adjusting the data to conform with the data entry guidelines of Family Tree (so the information you copy into Family Tree can be properly understood by Family Tree’s search engine). Do the following:

   a) In your PAF file, move all nicknames and additional name variants from the Name field to a second Name field.

      Example: If your PAF record gives the name as John Peterson OR Pederson, leave John Peterson in the Name field and create another Name field for John Pederson. When you upload the record into Family Tree, the search engine will be able to search correctly on both name variants.

   b) In your PAF file, make sure you do not have double dates or other non-standardized data in the date fields.

   c) Standardize the names of places in your PAF file. Several of the Affiliate software programs have this capability.

Tip: Standardization is generally a quick and simple process. However, if you do not have the name of a county in your PAF place name, you might have to do some research to determine which of the suggested place names represents the location intended by your PAF place name.

\(^{18}\)Throughout this manual I use PAF generically, to include Ancestral File, Legacy Family Tree, RootsMagic, and other home genealogy software programs.
**Tip:** If your PAF record lists Town, County, State, Country, and the standardized place names list only offers the County, State, Country, you are generally safe to leave your place name as it is. Family Tree will almost always understand the location and use the County, State, Country from its standardized place names list, without you needing to modify the place name in your PAF record.

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**Don’t attempt to synchronize your PAF file with Family Tree until you have completed all the necessary preparations.** The necessary preparations must be performed, or you will actually create work for yourself in the long run.
Step 16. Synchronize your PAF file with Family Tree.

Synchronization will allow you to selectively copy data from PAF to Family Tree and from Family Tree to PAF. (Again, I am using the term PAF to represent all home computer genealogy programs.)

At the present time, Synchronization is not possible. The Affiliates need to re-write their programs to conform with Family Tree. But the feature should be available within a few months.

Currently, you can upload data from PAF to Family Tree via a GEDCOM, however you cannot download data from Family Tree to PAF. When you use a GEDCOM to upload data, you compare each field of each person’s record with the corresponding field for that ancestor’s record in Family Tree, and you elect whether to contribute the field. (Release Notes, pages 3 - 4, and Using the FamilySearch Family Tree, pages 48 - 58, explain how to upload a GEDCOM to Family Tree.)

Tip: As you are synchronizing, compile a list of the people you add to Family Tree and a separate list of people you add. (Keep the second list by name and Person Identifier.) You will use these lists in Steps 17 and 18.

Plan Your Synchronization

Before you begin, have a plan. (Review Step 4, on pages G4).

1. Don’t upload records of Living Persons.
2. Don’t upload confidential information.
3. Don’t upload records of individuals born in the past 110 years if the closest living relative would not want temple ordinances performed.
4. Download data for nuclear families who are already in your PAF file.
5. Don’t download records that are outside the bounds of your personal research. (See pages G4.)
6. Have a method of keeping track of which families you have synchronized. Some Affiliate programs help you do so. If the one you use does not, print out your pedigree and check off families as you finish synchronizing them.
Step 17. If you added data to people’s Family Tree records, review those records to:

a) See if you need to make further modifications to their records, based on the data you added.

b) See whether the added data will enable you to find additional Sources to attach to their Family Tree record.

Step 18. If you added people to Family Tree during Synchronization:

a) Attach Sources to their Family Tree record: See Step 8.

b) Add them to your automatic notification system: See Step 12.

c) Create Discussions: See Step 11.

a) You might reserve them for temple ordinances (if you are LDS): See Step 14.
ON-GOING ACTIVITIES:

The following are on-going activities which you will want to perform throughout the remainder of your life: Collaborate, Watch, and Index.

**Collaborate:** Communicate with other researchers!

Family Tree is a collaborative or shared family tree, so our family tree isn’t all ours. We need to work with our relatives as partners, not as competitors for our family tree. So, first off, we need to start with respect and Christ-like love toward our distant cousins.

In the past we have often been highly possessive of our research. Aunt Nellie would work all her life researching her ancestors but never share her research, particularly her sources. That attitude has to be completely expunged from our souls.

The objective of Family Tree is that descendants of common ancestors will communicate with each other, that we will share our information and our sources, and that we will jointly analyze the data to come to the truth concerning our ancestors.

**Carve up your family tree (for research purposes) among the descendants.**

Family Tree gives us the best means we have ever had for collaborating with other descendants. You can identify others who are researching your family tree by seeing who has created Discussions, or has attached sources, or made editing corrections. Click on the names of Contributors to obtain their email address.

*The best way to efficiently and accurately build your family tree is for the descendants to each select a small niche within the family tree to research. Then, each researcher posts his findings on Family Tree with detailed Notes and Sources.* You could coordinate this carving up of the family tree by sending emails to other Contributors. If you are too shy to do that, you could create a Discussion in the record of a key ancestor to declare the “territory” you are researching.

My suggestion is to keep your niche of the family tree small and geographically-localized. (It is far better to do a great job on a small territory than a mediocre job on a large territory. After all, you can always add another niche later after you exhaustively research your original niche.)

**Periodically update your Discussions.**

The Discussions feature is great, but we will need to keep Discussions fresh by eliminating the “dead wood” (Discussions whose questions have been resolved). Most of the current Discussions were previously Disputes. As you correct the data in Family Tree which you previously disputed, you should delete your Disputes-turned-Discussions. So you will need to periodically review your Discussions and either edit or delete them. Therefore, it is wise to keep a log of which ancestors you have created Discussions about.
Treat Others With Respect And Christ-like Love

Family Tree is a collaborative effort. Any time people work together, it is natural for there to be conflicts. Our feelings toward our ancestors are very emotionally-charged. That often causes us to be angry if others have messed up our ancestors’ records, particularly their temple records. But we need to remember that we are all sinners and will not be able to return to Heavenly Father’s presence without the Redeemer’s saving grace and forgiveness. He requires us to forgive others if we want to be forgiven.

So, let’s be understanding and respectful toward our distant cousins. Let’s incorporate in our hearts Christ-like love toward our distant cousins (even if they make blunders in our collaborative genealogical records.) Let’s create everlasting friendships with our distant relatives.

Watch the records in the portion of your Family Tree which you have researched (your research niche), through Family Tree’s automatic notification system (the Watch feature).

Step 12 explained the automatic notification system (the Watch feature). Throughout the remainder of your life, you should Watch the Family Tree records of those individuals whom you have personally researched. (Your Family Tree will almost always be much larger than your own research niche. Please don’t try to Watch the records of your extensive lineages that may run back into the 1500’s. If you did not research those extended lineages, there will be very little benefit to Watching those records. You will just create unnecessary havoc for yourself.)

From time to time, the Watch feature will advise you of great news. A distant relative will add birth or death data you were lacking, or perhaps even make a breakthrough which will take your lineage farther back.

Other times, the Watch feature may advise you that someone has added information that you can tell is incorrect. If you are certain the patron’s change is erroneous, you should correct it in Family Tree and provide a well-documented explanation why your conclusion is correct, citing attached sources.
**Index:** Serve at least one hour a week as an Indexer or Arbitrator in the FamilySearch Indexing program.

Family Tree is a great program, but it will never fully achieve its purpose without the FamilySearch Indexing program. The future of genealogical research is the union of Family Tree with FamilySearch Indexing. They are two sides of the same coin.

Instead of listing our sources, we now can create live links into the FamilySearch Indexing database (which is called Record Search). All records of genealogical value in the world will be indexed, and all will be linked into Family Tree. Only by this means will we be able to build a complete and accurate family tree (to the extent our ancestors have extant records).

FamilySearch Indexing makes genealogical research far, far, far easier, faster, and more accurate. However.......in order to benefit from this great advance, we all need to do our part in indexing the records.

So, I ask you, please become an Indexer. I have written this manual and posted it on the internet at my own expense in order to make it free to you. If you feel gratitude, you can repay me by becoming an Indexer in the FamilySearch Indexing program. And then I will feel eternal gratitude to you.

You can become an Indexer by going to [Indexing.FamilySearch.org](http://Indexing.FamilySearch.org) Click the Test Drive button to see what Indexing is like. Then click the Get Started button to register and to download the Indexing software to your computer. There is no obligation; if you try Indexing and decide it is not for you, no one will contact you to “twist your arm” to continue Indexing. It is an entirely voluntary program with absolutely no obligation to continue. But personally I think you’ll love it.

Before registering, you might want to contact a Family History Consultant in your ward or at your local Family History Center. Family History Consultants can help you register and download the software, and they can provide you personal training so you will feel more comfortable Indexing.

God bless you!
CHAPTER H: RESOLVING MAJOR PROBLEMS IN FAMILY TREE

Wrong Gender

1. *If temple ordinances were NOT performed for the person, and his/her gender is listed incorrectly:* You can now correct an unmarried person’s gender in Family Tree. Just click on the person’s gender, which will reveal an Edit button.

If you try to correct the gender of a married person, you will get a Save Failed message. But virtually all wrong-gender records are shown as unmarried. If you have a married couple with incorrect genders, send a Feedback email to FamilySearch Support, giving their names, PIDs, your name, your relationship, your date of birth, and your helper number. Be prepared to support your claim with sources.

2. *If temple ordinances were performed for a person under the wrong gender:* Submit a Feedback email, giving the decedent's name and Person Identifier and explain that temple ordinances were performed for the person under the wrong gender. Also give your full name, birth date, helper access number, and your relationship. Provide the source of your information concerning the person's gender. FamilySearch Support can remove the record from view in Family Tree. (See Document 1014767 by clicking Help at FamilySearch.org.)

Incorrect Sealings

Submit a Feedback email if a person was sealed to the wrong spouse or parents. Include the names and Person Identifiers, and a thorough explanation, with sources. The Data Quality Team can remove records with erroneous sealings from view in Family Tree. (See Document 1014767 by clicking Help at FamilySearch.org.)

Please note the following Church policy: "Temple sealings that were performed PRIOR to 1 July 1969 with an incorrect mother's name can be redone with the correct mother's name. Sealings of children to parents performed AFTER 1 July 1969 are valid even if a wrong mother's name is given. The word ‘mother’ used in the temple ordinance takes precedence over any name that is given."

Incorrect Relationships

You can delete husband-wife relationships and child-parent relationships, including those created by other patrons. Also, if only one parent in a child-parent relationship is incorrect, you can remove the incorrect parent. This is a huge step in your ability to clean up the really messy portions of your family tree!
How To Delete a Husband-Wife Relationship

When you are in either the husband’s or wife’s Details Page, scroll down to the Family Members section, where you can see the husband-wife relationship. Click Edit Couple.

That will take you to a screen which looks like the one below. Click Delete Relationship and give a detailed explanation. (The couple’s records will remain, but they will no longer be shown as married to each other. And the Marriage event will be deleted also.)

How To Delete a Child-Parent Relationship

Go to the parent’s Details Page. Scroll down to the Family Members section, to where the child is listed. Hover the cursor over the incorrect child; that will cause an Edit Relationship link to appear after his name.

Click Edit Relationship, and the screen below will appear. Click Delete Relationship and give a detailed explanation. (The child’s record will remain, but he will not be a child of this couple.)

Additional Relationship Fixes are discussed on page L3.
How To Remove One Incorrect Parent

If one parent is correct but the other isn’t, go into the child’s Parent-Child Relationship screen, as you did above. Then click on the incorrect parent’s name. That will cause the screen to expand and provide you a Remove button and a Change button.

![Remove and Change buttons](image)

The Remove button removes the relationship between the child and the one erroneous parent; it does not end the relationship between the child and the correct parent, nor does it end the relationship between the parents (as they may have had other children).

The Change button brings up the Search screen so you can search for the correct parent and put that parent into the child-parent relationship. The Search screen also allows you to Add a new person if you cannot find a record for the correct parent.

**Perpetual Loops**

One of the major problems in New FamilySearch was Perpetual Loops. A Perpetual Loop occurs when the same person is listed generation after generation after generation in your pedigree chart. A Perpetual Loop prevents you from seeing earlier generations. A Perpetual Loop is caused by an incorrect parent/child relationship, typically the person linked to himself as his own father.

Perpetual Loops can be easily corrected in Family Tree by the means explained on page H2 to deleted an incorrect parent/child relationship.

**Twins and Children with the Same Name**

Since twins have the same birth date, they are susceptible of being confused as the same person, particularly if they are of the same gender. There is also the problem of two children in the same nuclear family with the same name. For a long time, it was a custom in many countries that if a child died at a young age, the parents gave the same name to their next child of the same gender.

To avoid improper merging, in addition to utilizing the Not A Match feature in the Possible Duplicates screen, I suggest you create a Discussion and also create a Custom Event in the Other Information section. To create a Custom Event, go to the Other Information section, click Add, and click Custom Event (at the bottom of the list of fields you can add). The Discussion won’t appear in the merge screen, but the Custom Event will.
How Can I Best Contribute To Genealogical Research?

We have probably done 20 times as much work as we needed to, to accomplish the amount of genealogical research we have completed. We have spun our wheels. We have all trod down the well-beaten path, re-researching what a dozen researchers before us researched, while leaving the less-obvious paths virgin. We were disorganized.

With the dawn of the Information Age and particularly the internet, we gained invaluable tools (email, websites, etc.) which allow us to collaborate in ways we were never able to collaborate before. The computer is a fabulous tool with incredible processing power and speed, which we can now utilize to organize ourselves in a far, far, far more efficient manner.

So how do I fit in? How can I best contribute to genealogical research? How can we organize ourselves to accomplish the most with the least amount of work?

Step 1: Start Indexing

In 2006, the Church inaugurated the FamilySearch Indexing program, which was an expansion of the former Extraction Program. The Indexing program takes full advantage of the computer and internet, to enable individuals to make a very meaningful contribution to genealogical research. Over time, we will index all the records of genealogical value in the world. Then, all genealogical source records will be at your finger tips—you will be able to build your family tree 100 times faster than you could by traditional research methods.

But you don't have to wait until we've finished indexing all the genealogical source records in the world; the indexed records are added to the searchable database as soon as they are indexed—so you can start using the indexed records today. Church members, with the aid of some volunteers outside the Church, have already indexed nearly one billion historical records, which are available for you to research now—at no cost—at familysearch.org. Just type in what you know about an ancestor, and all the possible matching records will pop up in a matter of seconds! And with that information, you should be able to extend your family tree one generation at a time. The more we index, the further back you will be able to extend your family tree. So...

Every able-bodied person aged 13 or above with access to the internet should index! Indexing is relatively easy; it is something that virtually anyone with decent eyesight, average intelligence, and internet access can successfully accomplish. To get started, log onto indexing.familysearch.org, or ask your ward's Family History Consultant to help you.

Indexing should become a lifelong habit. You don't have to spend a huge amount of time indexing each week. Half an hour a week would be great, an hour a week would be terrific. But if you keep that up over a period of years, you will make a huge contribution to genealogical
research.

For most people, Indexing should be the principal means by which they contribute to genealogical research. You don't have to become a genealogy guru to make a big contribution. You can make a huge contribution through the Indexing program.

**Step 2: Research Your Family Tree Back to Your Great Grandparents**

A good number of years ago, the Church asked everyone to participate in the Four Generation program. Four generations take you back to your great grandparents. It's the portion of your family tree which you know best. Also, it's the portion of your family tree which is most intimately yours, so it's the portion of the family tree for which you have the greatest personal responsibility. (You share your tenth great grandparents with millions of other descendants, but you share your grandparents and your great grandparents with a relatively small number of descendants.)

So, in addition to Indexing, everyone should ensure that the information on Family Tree about themselves, their parents, their uncles and aunts, their grandparents, their grandparents' siblings, and their great grandparents is accurate and complete. This may require you to research these family members, or the research may have been done by others. If the data was contributed to Family Tree by other relatives, you should review it to make sure it appears correct.

Whether you are researching or checking the research of others, you should look for source records for your close family members among the indexed records at familysearch.org. And when you find source records for your grandparents, etc., link them into their records in Family Tree. (You can only link source records for deceased people; Family Tree does not allow sources for Living Persons.) Pages G8 of this manual explain how to link source records into Family Tree.

If you will Index steadily and ensure your Four Generations are complete on Family Tree, then you can feel very good about yourself; and you can consider yourself to be a valuable genealogist. For most people, this should be sufficient. In fact, it's more than sufficient—it's commendable.

Now, of course, there are some fun activities you could add. It would be great to compile and share family photos with other family members. It would be great to write your personal history and perhaps the personal history of your parents or a grandparent. You don't have to be a great writer or an accomplished genealogical researcher to write a personal history. If you would just write down some of your favorite memories, they would be lovingly cherished by your children and grandchildren. And later on, as you recall other fond memories, you could jot those down too.
Step 3: Going the Extra Mile--Descendancy Research

If you want to go the extra mile, that's great. But doing more than what is outlined in Steps 1 and 2 really is going the extra mile. You don't need to feel compelled to do more than Indexing and your Four Generations, but if you have the time and the desire, then good for you!

Everyone automatically thinks of doing Ascendancy Research beyond their great grandparents, but I would suggest that for most people, Descendancy Research would be better. Descendancy Research is researching the descendants of a particular ancestor. You might start off by compiling the descendants of your grandparents, and then expand to compiling the descendants of your great grandparents.

Appendix A describes my personal experience doing Descendancy Research.

Descendancy Research is particularly appropriate for you if you have relatives who are anxiously engaged in Ascendancy Research. In other words, Descendancy Research allows you to carve out your own niche, and that is what we need to do--instead of a dozen people trekking over the same ground, it is better for you to look for some virgin territory.

Also, Descendancy Research will bring you into contact with your living relatives, and that can bring great experiences and incredible blessings.

The Great Need for Descendancy Research

The human population has grown exponentially. Today’s population is 4.5 times as great as the human population in 1900, 8 times as great as in 1800, and 16 times as great as in 1500. Further, source records are available for a far larger percentage of the population in recent generations than in earlier generations.

Thus, by the year 2050, of those who by then shall have died and who will have extant records, about 70% will have been born after the year 1900. About 82% will have been born after 1800.

How will we fill in the family tree for those born in the past century or two? Principally by descendancy research.

Descendancy research will probably provide about two-thirds of the human family tree; only about 18% of the human family tree will be built via research prior to the year 1800. Thus, you can see the great need for descendancy research.

19 Source: www.worldhistorysite.com/population.html.
20 Due to privacy laws, Family Tree is basically about the deceased. Thus, I performed the calculations only for the deceased. If the living were included, the percentages of those born after 1900 and after 1800 with extant records would be even higher than quoted above.
21 These are my estimates and are very rough. I couldn’t find any published source.
**Step 4: Going the Extra, Extra Mile--Ascendancy Research**

Now, if you have completed your Descendancy Research, or you have a sibling or cousin doing the Descendancy Research (and, again, it is always best to coordinate all genealogical research with your relatives, so you aren't trekking around behind each other), then Ascendancy Research will be your game.

But--and I am repeating myself intentionally--coordinate with other researchers. You have dozens of lineages on your family tree; don't try to research all of them. Carve out a niche. Pick one particular lineage and work on it, and hopefully another relative will pick out a different lineage and work on it; and a third relative will pick out a different lineage to work on, etc. And then, of course, share your findings, including all your sources, on Family Tree. That's how we will get the most work accomplished without everyone re-inventing the wheel.

I've suggested to FamilySearch that they create a Researcher Registry section on an ancestor's record in Family Tree, in which a patron who is actively researching that individual or lineage could announce to the world that he is doing so (to enable researchers to carve out distinct niches and to facilitate communication among researchers). But, alas, they haven't taken my suggestion. So what you might do is create a Discussion in the ancestor's record announcing to the world that you are researching that individual or lineage. Be sure to give your email address, so others can coordinate with you. I've said it a million times, Collaboration is the key to successful genealogical research.

**Step 5. Help Compile Cemetery Information**

Volunteers are needed worldwide to photograph and transcribe gravestones. BillionGraves.com and NamesInStone.com are FamilySearch Affiliates. If you think there might be cemeteries in your vicinity which haven’t been included in these sites yet, check them out! (Thanks.)

Cellphones serve well for photographing gravestones. To learn more about these programs, go to the sign-in page at New FamilySearch and click on the link in the far-right portion of the screen. When a new screen appears, click on Web in the upper right-hand corner, and then you will see the links for BillionGraves.com and NamesInStone.com.
CHAPTER J: AN APPEAL FOR EVERYONE TO BECOME AN INDEXER

FamilySearch Indexing—the Quiet Giant

In 1938, the Church initiated a greatly-inspired (and expensive) program of microfilming records around the world—despite the fact we were in the middle of the Great Depression! The microfilming project moved the work of redeeming the dead forward by a huge bound. The number of names submitted for temple work, and consequently the number of temple ordinances performed, increased many fold.

Over the past 74 years, the Church accumulated approximately 6 billion records through both microfilming and, in more recent years, digital photography. Millions of those records were extracted over the past 38 years, supplying half the names we have used for temple ordinances during that period. But the vast majority remain on microfilm, largely untouched. The Church is rapidly converting all those microfilms to digital photographs, and digitally enhancing them in the process. So, there will come a time when your eyes will no longer roll back in your head from reading microfilm! 😊

Additionally, the Church is shooting 800,000 new images per week. (An image may contain several records.)

The Church wants to index all those digital records so they will be easily accessible. If you haven’t used Records Search at FamilySearch.org, you really should.22 If you ever researched microfilmed records, you will see that Records Search is thousands of times faster and so much easier on the eyes!

The big task is indexing all those records. For that purpose, the Church hopes many hundreds of thousands of members will volunteer. The indexing program began in 2006. As of June 2012, 818 million records had been indexed and are available to be searched at Records Search. Of these, 122 million were indexed in 2011 by 223,000 volunteer Indexers and Arbitrators. Indexers are now averaging over a million records a day. So the growth has been exponential. But the Church needs many, many more volunteers to index the billions of records it has accumulated. Ideally, everyone between the ages of 13 to 80+ should be active Indexers.

So my appeal to one and to all is Please become an Indexer!

The Lord has granted us immense blessings with computers and the internet and other modern technology to assist us. The Brethren have declared that modern technology has been given by the Lord to mankind, through inspiration, for the very purposes of carrying out the Lord’s work in these latter days. And as President Eyring has pointed out, “Where much is given, much is required.” Thus, if we do not do our part, by utilizing the tools the Lord has given us to perform this work, then our negligence may place our salvation in jeopardy.

22Records Search is on the homepage of the new version of FamilySearch.org.
So, please, please become an Indexer! Together we can move this work forward at an astounding pace. It just takes everyone doing their part. No one will be asked to carry a heavy burden. Most Indexers only spend about an hour a week indexing, but in the aggregate we can index huge volumes of records if each member gives just a little of his time.

Please encourage all of your ward members, aged 13 and above, to become Indexers.

And even the 6 billion records in the vaults of Cottonwood Canyon are only a fraction of the world’s records of genealogical value. The Church estimates there are 70 billion records of genealogical value in the world, and that number increases by about 500 million annually (200 million birth records plus 300 million other records).

So, we will first index the 6 billion records we currently have copied, and then we will digitally copy the rest of the records and index them as well. It sounds like a huge job, but the entire huge task could be accomplished in just a few years if every active Latter-day Saint gives just one hour a week to this great work!

As the records are indexed, they are added to Records Search. Ultimately, when all the records are indexed, finding your ancestors will only take a few keystrokes. You will type in the name, an approximate birth year and a probable place of birth, and all the possible matches will come up in seconds, ranked by greatest probability of a match. In a few days, a person will be able to build a family tree that would have taken thousands of hours over a lifetime.

So let’s put our shoulder to the wheel!
Be Careful with Double Listing of an Ancestor’s Name

I saw my ancestor’s name listed exactly the same way in the Vital Information section (at the top of his record) and in the Other Information section. So I deleted the redundant Alternate Name listing. Big mistake! Since I was the contributor who had created the record in New FamilySearch, his name was completely deleted in New FamilySearch! His record appeared with the name Unknown Name in New FamilySearch and in Family Tree’s Temple Ordinances section.

The Engineers say this bug will be fixed soon. Until then, don’t delete a redundant name in the Other Information section if you were the one who contributed the name in New FamilySearch.

You Now Must Refresh Your Screen After A Merge

After you perform a merge, if you want to review the merged record, you need to refresh your screen. Otherwise, the Vital Information will reflect the merge, but the Family Members and some other sections of the record won’t. Sometimes the merged data doesn’t display correctly for a few hours or even a few days! This bug first arose in early February 2013. The engineers are working to correct it.

Other known problems are explained in the 15 November 2012 Release Notes (in the Help Center).

Additional known problems are discussed in Chapter L.

If you are aware of major bugs in Family Tree, please notify me at GeorgeSonOfCarl@aol.com and I will promptly add them to this chapter, so other patrons will be alerted to avoid them.
CHAPTER L: LATEST CHANGES TO FAMILY TREE

It is wise to periodically review the Release Notes to see whether there are recent changes. The Release Notes are available at https://familysearch.org/tree-training.

30 March 2013 Update: Separating Erroneously-Combined Records Is A High Priority

A note from FamilySearch Data Administration: “You can delete wrong relationships in Family Tree. In the future, you will be able to remove wrong temple ordinances as well.

“The cases you need to send in to us now are the ones you cannot do yourself in Family Tree, such as separating records. In the near future, when new.FamilySearch is discontinued, no one [including FamilySearch Data Administration] will be able to separate records, so we need to do those cases, as a high priority.”

6 February 2013 Update: New FamilySearch Will Be Left Open As A Read-Only Website

Many patrons have asked FamilySearch to keep New FamilySearch open as a read-only website for a while after the transition to Family Tree is completed. A senior official at FamilySearch has confirmed it will be. He did not say for how long. The benefits are:

1) In Step 5 of Chapter G, I urge patrons to quickly compare nFS’s birth, christening, death and burial data to Family Tree’s data, to ensure data is not lost in the transition from nFS to Family Tree. Keeping nFS open on a read-only basis would facilitate this.

2) In Step 6 of Chapter G, I suggest you determine whether your ancestors’ records are hijacked records (records which pertain to more than one person). I think there are many hijacked records. In resolving a hijacked record, it often is useful to go into nFS’s combined records screen to determine which records pertain to which individuals.

Two-Way Links Between Source Records and Family Tree Records

He also said that in the future, there will be links in both directions between source records and Family Tree records. In other words, when you look at a source record, you will be able to see whether the source record has been linked to a Family Tree record, and if so, to whom.

19 January 2013 Update: Reserving Ordinances

Previously, you needed to start in the Pedigree Chart in order to reserve ordinances. Now you can do it from the individual’s Details Page, in the Temple Ordinances section:

As of 28 March 2013, this Request Ordinances feature is problematic. It is better to request ordinances from the pedigree chart until this bug is fixed.
5 January 2013 Update

Sandy Stewart of Eagle, Idaho emailed me with the following input, which she learned from a senior FamilySearch Support missionary:

**Different Search Results in nFS and Family Tree**

Sandy noted, “I have also found that when I search for someone in Family Tree and it does not find them, I should also search in NFS. Even using the exact same criteria, I can find who I am looking for in NFS more than 50% of the time.” This is because the algorithms in the Family Tree search engine are different from the algorithms used in the nFS search engine. That is also why you will find new Possible Duplicates in Family Tree which did not show up in nFS, and vice versa.

**Timing Delays**

“It may take hours or even days after you add data to Family Tree before you can search for the record based on the data you entered. You may make changes which do not show up for some time, including deleted relationships. If you make a change and can't see the change, go back a few days later and see if it really has been made. Engineers are working to fix this problem.”

**You Become the Contributor Whenever You Are the Last to Touch Data**

“When you merge two individuals and move information from the right to the left of the screen, YOU become the contributor of that information that you moved over. The Support Missionary suggested you might want to create a Discussion explaining data that you may or may not know the origins of or even look up the original contributor before you do it and add that information to a Discussion or the notes explaining the merge.”

**Unmerge vs. Restore**

Unmerge only works if you unmerge the record before any other changes are made to that person. If you or someone else changes anything, even add a source, after the Merge, then you have to Restore instead of Unmerge.

When you Restore, any changes made after the Merge will be part of the record which retains the Merged record’s PID. If any of those changes pertain to the other record, you need to delete them from the one record and add them to the other record.

**Parent-Child Relationship Difficulties**

Sometimes in Family Tree you will find a child correctly linked to his father and mother but also linked to the same father with no wife. If the PID's for the fathers are different, you need to merge them, which may fix the problem. If the PIDs of the father are the same, this cannot be resolved the way we did in nFS (by combining the Unknown Spouse with the mother); that procedure doesn’t currently exist in Family Tree.
So this is what you do: Expand the children of the father without a spouse by clicking *Children*. That makes the child appear. Now, hover your cursor over the child’s name, and an *Edit Relationship* link will appear. Click *Edit Relationship*, and you will enter the Parent-Child Relationship screen. Now, click *Delete Relationship*.

You might be afraid that it will delete the good relationship (the relationship between the child and his father and mother); don’t worry–it won’t. It will only delete the duplicate relationship that you want to eliminate. The computer will ask you to enter a Reason; enter “Duplicate Relationship.” If there is more than one child listed with the father without a spouse, you will need to repeat this procedure for each child.

**8 January 2013 Update: How to Merge Records Not Listed As a Possible Duplicate**

Pat Christensen provided this: You can get Family Tree to compare two records as possible duplicates even when the system doesn’t evaluate them as such. Before you proceed, please use care in making sure that the records both represent the same person.

1. Sign in to FamilySearch.org
2. Find the ID numbers for each of the duplicates.
3. Decide which ID number has the most correct information.
4. Copy the URL below to a word document and adjust it as follows:
   https://familysearch.org/tree/#view=merge&person=ABCD-123&otherPerson=ABCD-456
   a. Change the ABCD-123 to the most correct record ID.
   b. Change the ABCD-456 to the possible duplicate ID.
   Cautions: Do not add or delete spaces; Letters must be capitalized.
5. Highlight the changed URL, and copy it with Ctrl+C.
6. Paste the URL in the address bar of your browser using Ctrl+V.
7. Press Enter.

This process should bring up the merge screen with the most correct record on the left and the other on the right. You can then go through the merge process.

**6 March 2013 Update: The Helper Function Is Now Available in Family Tree**

Page G3b explains Family Tree’s Helper function.

If you (the reader) have discovered new things about Family Tree which other patrons should know, please email me at *GeorgeSonOfCarl@aol.com*. Thanks.
APPENDIX A: DESCENDANCY RESEARCH—A PERFECT, INEXPENSIVE CHRISTMAS GIFT

Most genealogists do ancestral research, but for the past few years I have concentrated primarily on descendancy research, because there are a dozen other researchers working on each of my ancestral lines.

So, five years ago, I decided to research the descendants of my great grandparents. I started by looking up my great grandparents in the censuses, and also their children and grandchildren. The most recent U.S. Federal Census available for public use is the 1940 census, which lists my parent’s generation. I then delved into a number of other documentary databases, primarily at online repositories, such as Ancestry.com. Family Tree is also a great aid in descendancy research.

Next, I called all my cousins and asked them if they knew the names and phone numbers of some of our second cousins. I called these and obtained the names of more and more second cousins. Before long, through this family network, I had located virtually every descendant of my great grandparents. They were also very helpful in assisting me to fill in the holes in my documentary research on their respective branch of the family tree.

Finally, I prepared four family directories, one for each set of great grandparents. PAF, RootsMagic, Legacy Family Tree, and Ancestral Quest all have a feature that will take your database and convert the data into a book-like format. So, I selected the descendants of each set of great grandparents, and transferred the data into a word processing document. I added a few comments and deleted a few things, and in a short time, I had family directories for each of the four lineages.

The family directory provided the standard genealogical data for each descendant of that set of great grandparents. Additionally, for living descendants, it listed the phone number, address, and email address, so we can all keep in contact with each other.

I printed off a copy for each living descendant and sent them out as Christmas presents. It cost me two or three dollars per relative. The response I received was amazing! Everyone was so happy with their family directory! I even bumped into a couple of relatives interested in ancestral research, so we are now collaborating.

After the fact, I realized that was quite a nice member-missionary project (although I had not originally intended it as such). I am the only one in my extended family who is LDS, but they all know I am. The family directory created a lot of goodwill toward the Church.

For individuals whose relatives are LDS, it might prove to be an excellent re-activation tool for those relatives who are less-active.

The Spirit of Elijah is a very strong influence....You might want to extend that Spirit to your relatives too.
APPENDIX B:  SHOULD I STICK WITH PAF
OR USE A THIRD-PARTY SOFTWARE PROGRAM?

The Church Supports But Will No Longer Update PAF

The Church provides technical support for PAF (Personal Ancestral File) users, but will no longer update PAF. The Church’s reasoning is that it has finite resources, which are not best allocated to updating PAF. As family history becomes more common in nations around the world, local members in the various language areas can best build genealogical computer programs designed to meet the unique needs of their region.

You can still download a free copy of PAF from FamilySearch.org. (Click on Products in the lower right-hand corner of the website.) But since the Church no longer updates PAF, it is becoming progressively obsolete on two major fronts:

1) PAF lacks the capability of communicating with Family Tree. PAF cannot upload data to FamilySearch nor download data from FamilySearch, which is an essential need for most LDS genealogists.

2) Now that Family Tree provides the capability to store links to source records, you might also want this capability in your home genealogy program, but PAF will not have it.

Thus, I suggest a great many of you either need to start using a PAF Add-On\(^\text{23}\) which can provide these capabilities, or switch from PAF to an Affiliate stand-alone program.

What You Need In A Home Genealogy Program

1. A home genealogy program serves as a database to store all your genealogical information. In addition to data, genealogy programs can store links into your family photos, scanned documents, and audios/videos which are stored in other programs on your home computer.

2. You need the capability of communicating with FamilySearch. You need to be able to upload data to Family Tree and to download data from Family Tree, which is called Synchronization.

3. Family Tree has the capability of storing links to source records which are on the internet. You will probably want to have the same capability in your home genealogy program.

   When you or other patrons create links to online source records in Family Tree, you may

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\(^\text{23}\)An Add-On is a computer program which works directly with PAF to perform functions PAF doesn’t perform. Family Insight is an Add-On. Ancestral Quest can function as either an Add-On or a Stand-Alone program. A Stand-Alone program replaces PAF.
want to download some of those links to your home computer program. If you create links to online source records in your home genealogy program, you will want to upload those links to Family Tree.

4. The third-party software programs offer research aid. They connect directly with online databases; they even give you research suggestions. If you are an active researcher, this can be very helpful.

**General Strategies for Software Selection**

*There is no one best home genealogy program.* Each is a little different. All of the FamilySearch Affiliates (RootsMagic, Ancestral Quest, Family Insight, Legacy Family Tree, etc.) are very good. One might be designed for ease of use, while another is designed for comprehensiveness of features. Which is best for you depends on:

- a) your computer skills,

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24 Affiliate programs (Ancestral Quest, Family Insight, Legacy Family Tree, RootsMagic, etc.) will be able to exchange (upload/download) sources with Family Tree.

25 I don’t think any of the home genealogy programs presently have the capability of storing links to online source records, but all the major Affiliate programs will soon.

However, you might hold off creating source links in your home genealogy program until the life of URL links is resolved. In the past, websites have often changed the URLs of source records. Thus, you could spend a lot of time creating such links, only to find out a year or two later that many of the URLs have changed and therefore are useless.

The links you create from FamilySearch’s Records Search (the indexed records) to Family Tree are “hotwired” so that if the URL changes, the new URL will automatically appear in the Family Tree records. So you won’t need to worry about source links which you create directly from Records Search into Family Tree becoming obsolete.

However, this may not necessarily be true of source links from Records Search which you create in your home genealogy program and then upload to Family Tree. Therefore, it is better to form the source links directly between Records Search and Family Tree. If you want the source links in your home genealogy program, then you could download them from Family Tree.

Also, if you create source links in Family Tree to other websites, you still run the risk of the links becoming outdated. FamilySearch is discussing this issue with many of the large commercial genealogy sites, such as Ancestry.com, and many of them are considering making their URLs unchangeable. But that is still down the road.

In the citation for your source links, always give the date you accessed the website. That will be helpful later, in deciding what to do when you discover a link is no longer working.
b) your family history research objectives, and
c) availability of help from your ward or family or friends.

The following discussion will be based mainly on factors “a” and “b”, but often “c” is the most important criterion. If you have a close friend who is an expert in one of the programs and who can help you, it is probably best to go with that program unless you have over-riding needs to use a different one.

Those who have never used a home genealogy program:

If you have never used PAF or another home genealogy computer program, I suggest you shouldn’t get into a home genealogy computer program until you have become thoroughly comfortable with Family Tree. Learning two computer programs at the same time can be overwhelming. Learn and use Family Tree first.

Then learn and use a home genealogy computer program which is used by a friend who can help you. PAF is free and so are the basic versions of Ancestral Quest, Legacy Family Tree, and RootsMagic. The basic versions of these third-party programs are adequate for your needs until you become a heavy researcher. Use whichever of these four programs your helpful friend uses. (If you use PAF, you will also want to use Family Insight for Standardization, explained in Step 15, and either Ancestral Quest or Family Insight for Synchronization, explained in Step 16.)

Current PAF users who do relatively little original genealogical research:

If you currently use PAF and you do relatively little original genealogical research, then it might be best for you to stick with PAF until you get comfortable with Family Tree, before you tackle another genealogy program. Your primary need in a home genealogy program is simply maintaining your genealogical database; PAF can still do that, just as the other programs do that well also.

Moving from PAF into a stand-alone product (RootsMagic or Legacy Family Tree or Ancestral Quest) is a major move; once you have moved your data from PAF to one of the third-party stand-alone software programs, you need to park it there for several years. Each of the software programs offers slightly different bells and whistles. As a result, each has some unique fields. Once you have entered information into the unique fields, if you transfer your data to a different software program, you will likely lose the data contained in those unique fields. So, you need to choose your software program carefully.

With the creation of Family Tree, the Affiliates’ programs will change substantially during the next few months, so we are basically in a wait-and-see stance right now. In the meantime, work in Family Tree and learn it well.

By mid-2013, we will be able to evaluate the Affiliates’ programs better, and by then you should probably select an Affiliate program. Again, the ability to get help from a friend is
important, so you will probably want to use the same program he/she uses.

Those who do a lot of original genealogical research:

If you do a lot of original genealogical research, particularly online (at Ancestry.com, etc.), then I really recommend you consider a stand-alone product now, because they have great research aids. They also communicate with Family Tree.

The most-used stand-alone FamilySearch Affiliate software programs are (in random order) RootsMagic, Legacy Family Tree, and Ancestral Quest.

So, which of these is best for you? Again, each is a little different. Each has different bells and whistles, and sometimes it comes down to what is the best “feel” for you. You might want to go to your local Family History Center and try them each out, to see which you like. Or you could download their basic versions (which are free) and take them for a test drive. If you are a serious genealogist, you will want to buy the full-feature version of whichever one you like best.

I don’t have enough room here to review their features. Just a few comments:

Legacy Family Tree is considered ideal for those who plan to publish genealogies in national publications, due to its excellent source citations format. It is an excellent, very thorough, full-featured program, but perhaps a bit challenging for a computer novice.

In contrast, RootsMagic has always strived for “ease of use.”

Ancestral Quest has always worked toward comprehensiveness. It also has the same “feel” as PAF, since the originator of Ancestral Quest was the originator of PAF.

I do want to say: Hats off to the Affiliates! They really have done a great job, particularly when you consider all the changes New FamilySearch has made. Writing a computer program to work with New FamilySearch and Family Tree when New FamilySearch and Family Tree were moving targets has been monumentally difficult, and the Affiliates have all done a marvelous job!
**What Software Programs Are Available?**

You should select your third-party genealogy program from among the FamilySearch Affiliates. A FamilySearch Affiliate is a company whose software has been certified by FamilySearch to interface correctly with Family Tree. You can learn about all the Affiliates’ software programs by clicking the *Products* link in the lower right-hand corner of the FamilySearch home page. (By the way, the Church receives no compensation of any kind from any of the Affiliates.)

Below, I will list the programs which include the Synchronization feature, which I consider essential. There are additional programs without the Synchronization feature available at the link described above.

**Windows-compatible Programs**

The most commonly-used Windows-compatible FamilySearch Affiliate genealogy software programs are (in random order):

*Family Insight*, from Ohana Software, is a PAF Add-In. (That means it is designed to work with a PAF file.) It has an excellent program for Standardizing your PAF place names in conformity to Family Tree’s standardized place names (which you need to do in Step 15, as explained on pages G15, as one of the essential preparations before Synchronizing your PAF file with Family Tree). It costs $25 to download it, at ohanasoftware.com. There is also a 60-day free trial offer (which is actually plenty of time to Standardize your place names and Synchronize).

*RootsMagic 6* is designed to work as a stand-alone program; it will easily import your PAF file. It has an easy-to-use Synchronization feature. It costs $29.95 to download, or $29.95 plus shipping for a CD at rootsmagic.com. RootsMagic also offers an Essentials (basic) version which can be downloaded for free.

*Ancestral Quest 14*, from Incline Software, can work as a PAF Add-In or as a stand-alone program. It has the most comprehensive Synchronization feature. It costs $29.95 to download, or $34.95 plus shipping ($5 in USA) for a CD at ancquest.com. Ancestral Quest also offers a free basic version which will perform all the genealogy database management processes and which will do all of the communication with Family Tree; the basic version lacks some of the bells and whistles more advanced genealogists use.

*Legacy Family Tree 7.5*, from Millennia Corp, is a stand-alone program; it too will easily import your PAF file. It released its Synchronization feature in January 2011, which I have not tested, but I hear it is good. It costs $29.95 to download, or $39.95 for a CD and a user’s guide at legacyfamilytree.com. These are the costs of the Deluxe version; the Standard (basic) version can be downloaded for free.

These vendors also offer bundle deals if you want to purchase more than one product.
There are two new Windows-compatible FamilySearch Affiliate programs:

*Branches*, is a stand-alone program available at [branchesgenealogy.com](http://branchesgenealogy.com). You can download a free 30-day trial. It costs $14.95.

*Gaia Family Tree* is a stand-alone program available at [gaiafamilytree.com](http://gaiafamilytree.com). It is currently available for free.

**Mac-compatible Programs**

*Family Insight*, described above, also comes in a Mac version.

*MacFamily Tree* is a stand-alone program available at [syniumsoftware.com/macfamilytree](http://syniumsoftware.com/macfamilytree). It costs $59.99.

I am not experienced with Mac, but I am told that Windows programs can be run on newer Mac computers with Parallels or Double Boot.

**Software Awards**

In March 2009, FamilySearch Software Awards were announced. (Awards of this type have not been given more recently.) The major awards were:

- Family Insight for “Best Standardizer”26 and “Best Person Separator”27
- RootsMagic for “Easiest to Sync” and “Best Dashboard”28
- Ancestral Quest for “Most Comprehensive Syncing”29 and “Best Listing Tool”

However, the awards only evaluated the programs’ New FamilySearch functions (and Legacy had not qualified at that time as an Affiliate). Ancestral Quest, RootsMagic, and Legacy Family Tree should also be evaluated for their database management capabilities, research aid functions, and the manner in which they handle sources.

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26For Standardization of place names. (See Step 15.)

27For Separating out records which should not be in the person’s Combined Record.

28The Dashboard maintains over-all control of working with New FamilySearch.

29Ancestral Quest was awarded Most Comprehensive Synchronization, while RootsMagic was awarded Easiest-to-Use Synchronization.
My Ideal Home Genealogy Program

I don’t want to detract from the achievements of the Affiliates, because I do feel they have done a great job, but what I would love to see in the future is a home genealogy program that looks and functions much like Family Tree, with most of the same fields, procedures, and screens.

Using the same computer architecture online and at home would make it easier for more people to get into the genealogy groove, as they would basically only need to learn one computer system rather than two. It would also facilitate sharing data between one’s home computer and Family Tree. (Examples: identifying the name parts, and standardized place names.) We need to use the same data entry guidelines at home as on Family Tree, to facilitate uploads and downloads between the two.

It would be nice when you are looking at an ancestor’s record on your home computer program to be able to click a button and see the Family Tree record of that person side-by-side with your home computer program’s record, both in the Family Tree Details Page format, with all differences in data highlighted. That way, you could readily decide whether you need to do something in respect to this ancestor. And then it would be great to be able to synchronize that record, using a procedure similar to Family Tree’s Merge function.
APPENDIX C: INTERNET BROWSERS,
ONLINE AUTOMATIC BACKUP SERVICES, AND CLEANERS

Internet Browsers

The most common web browsers are Internet Explorer (written by Microsoft), Firefox (written by Mozilla), Safari (written by Apple Computer, but it performs well on both the Macintosh and the PC), and Chrome (written by Google). There are also several other good browsers available.

FamilySearch websites fully support Internet Explorer 9, Firefox 13-15, Safari 5-6, and Chrome 20-21. Limited support is provided to older versions of these browsers, as explained at Document 113212 in FamilySearch’s Help Center. If needed, you should upgrade your browser to be sure it is fully supported by FamilySearch. To see how to read your browser version, see Document 5623p_en.

I personally recommend Firefox, Safari, or Chrome as your default browser for virtually all internet use for one major reason: Most computer viruses, worms, and trojans are written to circumvent security weaknesses in Internet Explorer. Thus, you can reduce your chance of encountering a computer virus, worm or trojan by switching browsers, although more malware is beginning to be written targeting the other browsers also. You should always maintain your anti-virus and other security software up-to-date.

You can download Firefox for free at mozilla.com.
You can download Safari for free at apple.com/safari/download.
You can download Chrome for free at google.com/intl/en/chrome/#cds.

Free Automated Online Backup

There are several good online backup services. One is at mozy.com. You receive a free account with 2 gigabytes of storage. That is more than sufficient for your genealogy files and other data documents. However, if you have thousands of pictures, you will not be able to store them in 2 gigabytes. (Also, you don’t back up software programs; they can only be restored with the original CDs.)

Be sure to set your settings after you create the account. Thereafter, your files will be backed up automatically, without you having to do anything. You will receive notification each time your files are backed up.

It’s easy and it’s secure. Everyone using the internet should have automatic backup. However, don’t have Social Security Numbers or bank account numbers stored on your computer; with or without automatic backup, you are susceptible to hackers breaking into your computer.

Don’t Forget Computer Maintenance

In Family Tree, you will be flipping from webpage to webpage constantly, so your Temporary Internet Cache and your Browsing History will fill up quickly, which can slow down your
computer. A good utility to clean up these (and more) is CCleaner, which you can download for free at http://www.piriform.com/CCLEANER. You will be AMAZED at all the junk in your computer, which CCleaner will clean up. Run it daily. (I run it several times a day, since I “live” at FamilySearch.org.) Piriform also has a good Registry cleaner, which is also free.

In addition to your regular anti-virus, it’s good to run MalwareBytes (at MalwareBytes.org) at least monthly. It does a deeper scrub than your normal anti-virus software, as it picks up the bits and pieces of malware that anti-virus will overlook, but it doesn’t replace your normal anti-virus. Uninstall it each time after using it, as it can interfere with some other programs.

**APPENDIX D: HOW TO INVOLVE OTHERS IN FAMILY HISTORY**

Family History Consultants are always dismayed by the small number of ward members who become involved in family history. A few years ago the Church conducted a study and determined that only 4% - 5% of Church members had ever submitted a name to the temple.

Here’s one simple way to involve a few more members in family history: At the end of their visit, Home Teachers and Visiting Teachers always ask if there is anything they can do to help you. Next time, say “yes” and ask them to index a few batches of records in the FamilySearch Indexing program. Offer to show them how to do so.

And, when you make your Home Teacher or Visiting Teacher visits, encourage your families to give Indexing a try. Offer to show them how to index.

**APPENDIX E: TRAINING MATERIALS FOR PRIESTHOOD LEADERS AND FAMILY HISTORY CONSULTANTS**

FamilySearch.org/consultant contains training courses about temple and family history work, some specifically geared for priesthood leaders and others geared for Family History Consultants. (You will be led to the courses after you sign in with your LDS Account username and password.)

Under the Core Training heading, the link entitled Temple And Family History Course Materials provides materials for a beginning-level class designed to help Church members start their family history research and perform temple ordinances for their ancestors. The class could be taught during Sunday School.

The courses at this site replace the previous e-Learning courses which were located under the Training And Resources tab at New FamilySearch’s Help Center.

The Family History Research Courses link leads you to a large number of locality-specific research courses.
Bishop, there’s a simple but very powerful formula for organizing a great family history program in your ward. A successful family history program won’t siphon off resources from other ward programs—it will raise the spiritual level of your ward, which will raise the level of human resources in your ward. So, you really can’t afford not to follow the formula.

Here it is:

1. Make sure your High Priests Group Leader understands his responsibilities in respect to family history.

The High Priests Group Leader is assigned to oversee family history and the ward’s Family History Consultants. He needs to meet with them periodically and report to you in the PEC meeting regarding the family history program in the ward.

Your High Priests Group Leader and your Family History Consultants should review the training courses at [https://familysearch.org/serve](https://familysearch.org/serve). (They must sign in with their LDS Account username and password. Then they should click on Online Training under the Core Training heading.)

2. Organize an effective team of Family History Consultants.

1) At least one Family History Consultant should be a good family history researcher.

2) One Family History Consultant should be a “computer geek.” He/she may know little about family history, but he can make a major contribution to the teaching of family history by helping ward members understand how to use the computer. No area of Church activity utilizes computers more extensively than family history.

3) One Family History Consultant should be a good teacher. He/she may know little about family history, but you should probably hold Family Tree classes, Indexing classes, and basic family history classes on a virtually ongoing basis. Thus, you need a strong teacher. If the teacher cannot answer some questions, the Consultant who is a strong family history researcher could field the research questions, and the “computer geek” could field computer questions.

4) Many wards call a Family History Consultant as Ward Indexing Director. This could greatly help ward members become involved in a lifetime of service in FamilySearch Indexing.

5) With the heavy training requirements of Family Tree, you might want to appoint one Family History Consultant to become a guru in Family Tree. (The presence of a guru in the ward creates energy and vibrancy that spills over into all the ward’s programs.)
6) If you are able to have still more Family History Consultants, you might appoint one to become a guru in PAF (Personal Ancestral File) and similar home computer programs. The “computer geek” could probably serve in either capacity # 5 or # 6. (It would be ideal if one person were an expert at PAF and Family Insight, another at RootsMagic, another at Ancestral Quest, and another at Legacy Family Tree. These assignments could be doubled with the foregoing assignments.)

3. **You need to set the example, Bishop.**

That’s not what you wanted to hear, but it’s the truth. The Savior led by example; you must do likewise. You can’t ask your ward members to work on Family Tree and FamilySearch Indexing if you aren’t. You have a conscience, and your conscience won’t allow you to ask others to do things you aren’t doing yourself. You can’t say: “Do as I say; don’t do as I do.” You have too much integrity for that.

Now, your natural reaction is that you are too busy. Bishop, you’re too busy not to do it. You want to raise your ward’s spirituality, and you want your ward members to enjoy the Lord’s blessings. The Lord has given us a major responsibility to identify and help redeem the dead; the Lord can’t bless your ward, Bishop, if your ward members are not doing what He has asked them to do. The Church conducted a study a few years ago and determined that only 4% or 5% of the Church membership had ever submitted a name to the temple. Can the Lord bless the other 95% of your ward members as He would like to? I don’t think so.

So, you need to take a little time—it doesn’t have to be a huge amount of time, an hour a month would suffice, or a little more would be great—to set an example both for your own family and for your ward family. That will turn out to be one of the most productive hours of your month, because it will leverage a huge amount of family history work by your entire ward. And then the Lord can bless them to a greater degree, and the spiritual level of your ward will rise.

It’s like investing $1 and earning $3 interest weekly. You just can’t afford not to do it.

You have to lead by example, Bishop. You can do it, and your ward will follow you. They love you, and when you share with them the spiritual blessings you experience by doing this great work, they will say, “If the Bishop, who is so much busier than I, can do it, then certainly I can.” And they will, Bishop.

4. **Challenge your PEC members to be good examples also.**

The power of example cannot be over-stressed. When you set the example and your ward leaders likewise set a good example, it becomes contagious.

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You might set aside one Family Home Evening each month for working on Family Tree and/or FamilySearch Indexing if your family members are old enough to participate. You would kill several birds with one stone this way.
5. **Invite a Family History Consultant to make a presentation to your PEC concerning Family Tree.**

The Church plans to replace New FamilySearch with Family Tree within the next few months. New FamilySearch provided us some good tools for speeding up and improving family history work. Family Tree provides even more tools.

6. **Set family history goals for your ward.**

You need to challenge your members. Nothing is ever accomplished without a goal and a plan. So, in sacrament meeting, you (the Bishop) need to present your family history goals to the ward members.

What are some family history goals you might set for your ward?

a. **Hold a Family Home Evening about your family history.** There’s nothing more fun in the world than sharing pictures of grandparents and aunts and uncles, etc. Share stories about the lives of your ancestors. Pull out your Book of Remembrance and share it with all the family. It’s an easy Family Home Evening to prepare. And the whole family will love it! Let the Spirit of Elijah into your home, the fun and easy way.

Other fun Family Home Evenings can be to Index together as a family, and to work on your Family Tree together.

Ward, quorum and Relief Society leaders should periodically encourage members to hold Family Home Evenings about their family history.

b. **FamilySearch Indexing:** Ideally, all Church members, aged 13 or above, should become active Indexers. In the least, every member of the ward should give FamilySearch Indexing a try. It would be wise for ward members to participate in a short Indexing class during the Sunday School hour prior to serving as an Indexer. Members unable to attend an Indexing class during Sunday School might attend an Indexing class offered at their local Family History Center. (Indexing can also be learned on a self-study basis, but a class is ideal.)

c. **Involve Young Men and Young Women in FamilySearch Indexing:** The Church especially encourages all Young Men and all Young Women to become active Indexers. Many wards take small groups of youth to their local Family History Center for training in Indexing. Parents should be reminded to encourage and assist their YM/YW in indexing. (Obviously, it would be best for the parents to be active Indexers.) Many wards incorporate Indexing into the Duty to God and YW Achievement programs.

d. **Family Tree:** Each adult member of the ward should attend a course in Family Tree. Adult ward members who do not have callings during the Sunday School hour might attend a Family Tree course during Sunday School. Members who have callings during the Sunday School hour might attend a Family Tree class taught at their local Family History Center. Adult members should become trained in Family Tree and thereupon clean up their Family Tree records.
Next comes the happiest part: Each family can then determine whether there are ancestral family members listed in Family Tree who need temple ordinances (after all Family Tree records for the ancestor have been properly merged). If so, the family should personally take those names to the temple. A Church study indicated 95% of members had never submitted a name to the temple. Performing the ordinances for a family member can be incredibly inspiring.

Family Tree can be a catalyst to help members prepare for a temple recommend. In fact, Bishop, you might select a few families you want to encourage to work toward temple worthiness to attend the Family Tree class or a basic family history class. It might rev them up.

e. **Home teachers and visiting teachers should encourage their families in family history.**

Home Teachers and Visiting Teachers are responsible to encourage and assist their families to benefit from the full Church program, including family history. Thus, Home Teachers and Visiting Teachers should ask their families if they are using Family Tree and if they are Indexing. Home Teachers and Visiting Teachers might give demonstrations of Family Tree and FamilySearch Indexing to their families, especially to less-active members, who might get interested and return to activity through involvement in these inspired programs, as they are touched by the Spirit of Elijah.

6. **Training The Ward In Family Tree And FamilySearch Indexing**

In order to properly train your ward members in Family Tree and in FamilySearch Indexing, you should plan on holding Family Tree courses and FamilySearch Indexing courses and perhaps basic family history courses during the Sunday School hour, on a rotational basis. (There are excellent materials for the basic family history course at [FamilySearch.org/consultant](https://FamilySearch.org/consultant) at the [Temple And Family History Course Materials link](https:).)

I wrote a manual entitled “How To Use Family Tree Wisely,” which is designed for teaching a course in Family Tree. It is available at [www.usingfamilysearch.com](http://www.usingfamilysearch.com) for free download.

Family History Consultants also need to avail themselves to go to members' homes to assist them with questions/problems related to Family Tree, FamilySearch Indexing, or any other family history matters.

7. **A Fun Ward Service Project**

BillionGraves.com and NamesInStone.com are FamilySearch Affiliates in which volunteers photograph and transcribe cemetery headstones. Assign your Family History Consultants to identify cemeteries in your area which have not yet been included in BillionGraves.com or NamesInStone.com. Then plan a Young Men, Young Women, or ward service project. Cell phone cameras work great for photographing headstones. This will be a fun and valuable service project.

This would also be a great Eagle Scout project.