

# *FamilyInsight: NFS Sync and Ordinance Prep*

## **Before You Start:**

The first three options on the opening page of FamilyInsight – Edit RINs and Pedigrees, Merge, and Edit Places are the main clean up modes and should be used in that order before you start doing Temple submissions. Using these 3 modes first will help prevent you from submitting or from searching duplicate records in your file. The Place Edit mode will ensure that you are using place names that will be accepted by the new **FamilySearch™** website without the need to correct each one as you go.

## **You Must Synchronize Before You Can Reserve**

You must synchronize before you can reserve to make sure that the ordinances have not already been done. By combining records on new FamilySearch™ you can combine any duplicates to prevent this.

### **Step 1: Open FamilyInsight and enter login to new.familysearch.org**

- Open your file in FamilyInsight
- Select “Full Synchronization”
- Enter your new.familysearch.org **username** and **password** in the login box.

### **Step 2: Search**

- Select a name that you want to search for and click Search  
**NOTE:** If you receive multiple messages about unrecognized place names, run FamilyInsight's Edit Places Mode, this will help you standardize you place names and save you time.
- Watch as search results come in

### **Step 3 (if there are no matches): Click the Add icon**

- If there are no matches, the status will say “Ready to Add”
- To ensure that this person will be linked to someone on the new **FamilySearch** website, also synchronize their child, spouse, or parents.
- Click the Add icon. This will add the person to the new.familysearch.org database and link them to any family members.

### **Step 3 (if you find Matches): Play Match Up**

- Click on a line that says “Decision Needed”. This will bring up the information of the online match in the right of the details panel at the bottom.
- Compare you information (left) with the possible match (right).
- If they are a true match click “Match” at the top. If not, click “Not a Match” (Not a Match will leave the file as it is on FamilySearch, you can come back to it later if you wish).
- You must mark all possible matches labeled “Decision Needed”, before going on.
- Records with “Decision Optional” should be reviewed but you do not need to mark them unless they are a Match. Click the Match icon when appropriate.

### **Step 4: Choose the information you would like to add to YOUR file**

- **Click on the row that says “Ready to Sync”, but do NOT click the “Synchronize” button until you have finished the following steps:**
- In the details panel, review the information from the **FamilySearch** matches (right side) and choose what information you want added to your PAF record (left side).
- Click the drop-down arrow by each piece of information to select an option for transferring the

information.

- To update parent or marriage information, you must first use the drop-down to “Match with MRIN [#]” or Add. This drop-down option is found directly under the heading Marriage or Parents on the right and the correlating MRIN # (Marriage RIN #) is above each spouse on the left.

#### **Step 5: Choose the info you would like to add to *FamilySearch* family tree**

- On the leftmost part of the details panel you will see check-boxes. Put a check in each box that is next to the information you want added to the new *FamilySearch* website.

#### **Step 6: Click the Synchronize Icon and Make it so!**

- After careful review, click the Synchronize icon. This will import and export the information you selected in step 4&5.

It is a good idea to synchronize an entire family before submitting members so that you can have all the links intact and all the ordinances ready.

### **Follow the Temple Icons**



This icon indicates all the ordinance for that person are completed according to your records.



The Temple with an exclamation point indicates you need more information before you can perform the ordinances. This may be remedied by searching for them in Full Synchronization Mode. This icon might also indicate they have ordinances that are in process or have died as a child.



The icon with arrows pointing right and left indicates that one of the relatives of this person must be synchronized before some ordinances can be reserved.



The Temple with an arrow pointing to it indicates that ordinances for the individual are ready to be reserved by you. **When you see this you are...Ready to Reserve!**

### **Ready to Reserve**

- Right click on the name with the green arrow icon and choose “Reserve Ordinances”, or choose the “Reserve Ordinances” option from the “Action” menu. A screen will come up showing this individual with their family.
- Check the individual ordinances you want to reserve, “Select All”, or “Select Entire Family”, then click “OK” in the top right corner.
- The Church Policy Agreement will open. After reading it, check “Agree”, then click on “Continue”.
- The list of the reservations you just selected will come up. Verify that everything is exactly the way you want it.
- Click on “Finalize Reservation”.

## Ordinance Tracker

The next screen will show everything on your reserved list. You can use the controls at the top to also see the names for which you have already printed a request, or the list of names you have assigned for the Temple to do.

- From the reservations view, you can click and drag ordinance cards that you would like to add to a Family Ordinance Request (FOR) to print or that you would like to assign to the Temple to do.
- If you choose to print a partial card such as just baptism and confirmation, the other ordinances for this person will be “On Hold” until those ordinances are completed.
- When you have selected all the names you want to print at this time, click on the magnifying glass to preview your Family Ordinance Request list before it is printed. Then click on “Print”. You may also preview the Release to Temple list in the same way.
- There will be a pause after clicking on the “Print” button and then your Family Ordinance Request (FOR) will open in Adobe Reader for you to print.

- From here you can

1. Print and take the Family Ordinance Request to your Temple for printing the ordinance cards.
2. Save the PDF and e-mail it to a family member to print and take to their local Temple.

It is easy to prepare names for the Temple with the confidence that you are not doing duplicate work using FamilyInsight. We hope you enjoy the program as much as we've enjoyed making it. Aloha!

### Don't Forget!

If you loose your way, you can get step-by-step guidance by clicking the “Guide Me” light bulb in the tool bar. The instructions it gives change depending upon what actions you have already preformed and/or which person is selected.

**FamilyInsight** is a **FamilySearch™** Certified Product that is currently compatible with **Person Ancestral File (PAF)**, **Family Tree Maker**, **Ancestral Quest**, and GEDCOMs from any program. We also expect to be compatible with **Legacy** and **RootsMagic** soon.



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