

FamilySearch

Fantastic and FREE!

Basic Training Module #1

Navigating the Home Page



Navigating the Home Page

FamilySearch Family Tree Basic Training prepares you to help develop, maintain and use what is expected to become the best-sourced family history website in the world.

But first things first!

To use FamilySearch Family Tree successfully, you'll first need to create your own personalised account and then learn the basics of navigating this amazing resource.

So let's begin ...



Objectives

When you've completed this module, you will be able to:

1. Create your own personalised FamilySearch account
2. Explain the purpose of FamilySearch and Family Tree
3. Use the Home Page bottom menu to access valuable information
4. Access your profile information to view your settings and make account changes
5. Locate and use the features in Solutions Gallery
6. Upload a GEDCOM file into Family Tree
7. Know what happens when you click on the FamilySearch logo
8. Locate the Feedback button and understand what happens when you submit a problem



Study Tip

The best way to learn how to use Family Tree is to **click on all the links!**

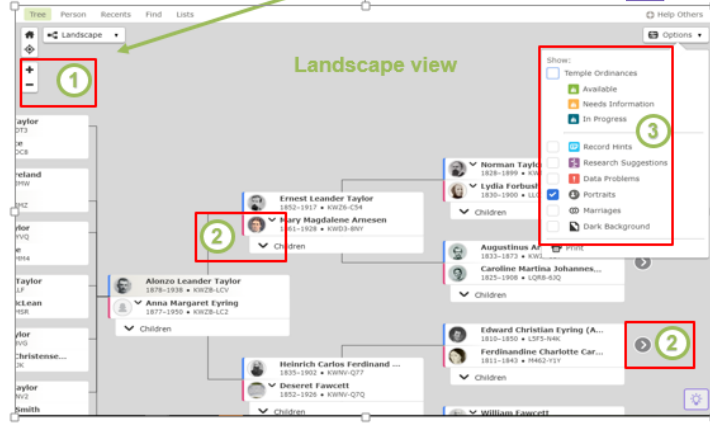
These modules will lead you through the most important features of the programme.

Landscape View in Family Tree

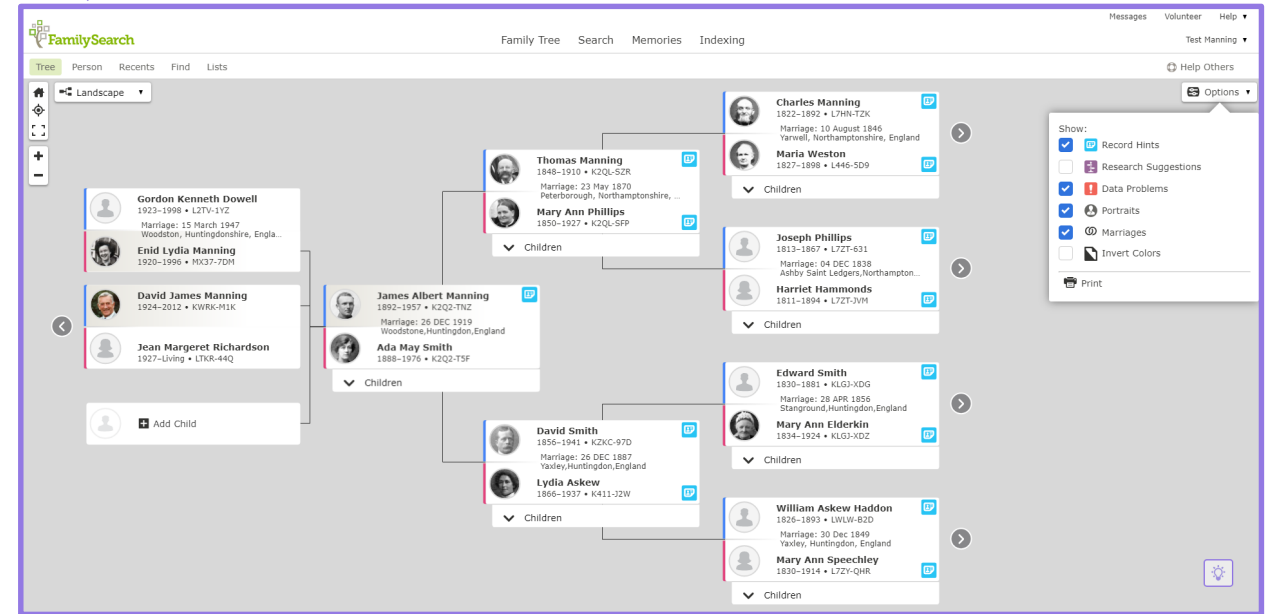
When you click on Family Tree from the Home Page, you see one of four pedigree views.

1. Use the **plus** or **minus** icons to enlarge or shrink the view.
2. Clicking on a **>** or **V** (arrow) will reveal more information, such as more generations, or more wives or children.
3. You can vary the information displayed by checking or unchecking information and alert icons under **Show**.

NOTE: The pedigree view you were last using when you signed out of Family Tree will be the view that opens when you sign back in.



As you study the lesson in one window, have a side-by-side window open to www.familysearch.org



Even better, if you would like to practise or replicate the processes described in the lesson without damaging your 'real' family tree use beta.familysearch.org test website instead of www.familysearch.org

Account Creation - Identity

In order to explore the FamilySearch website, you need your own FamilySearch account.

Fortunately, creating a FamilySearch account via the website is easy.

Just go to www.familysearch.org and follow the simple steps below:

1. Click **Free Account**
2. Enter the required information
 - a) First + Last Name
 - b) Birth Date (Month/Day/Year)
 - c) Sex (Male/Female)
3. Click **Continue**.

FamilySearch

Family Tree Search Memories Indexing

Volunteer Help

Sign In Free Account

1

Find Your Family.
Discover Yourself.

Learn where you came from, and get to know who you are. Our free family tree gets you started.

Create your free account 1

Create a Free FamilySearch Account

First Name Last Name

Ima Family-Historian 2a

Birth Date

January 1 2000 2b

Sex

Male Female 2c

I am a Member of The Church of Jesus Christ of Latter-day Saints. ⓘ

Continue 3

Account Creation – Username + Password

4. Enter a **Username**. If someone else is using your desired username, available variations appear beneath the field. Click one to choose it or enter a different username.
5. Enter a **Password**. If someone might see your password as you enter it, click **Show Password** to select or deselect.
6. Choose/**Select a Recovery Option** and provide either an email address or mobile phone number.
7. Select your **Country**
8. Tick to agree you accept the website **Terms of Use**.
9. Click **Create an Account**. This action generates an email or SMS message. You must activate your new account before it can be used – see next slide.

Create a Free FamilySearch Account
Ima Family-Historian

Username or Email Address

4

A username or email address is required.

Password

Show Password 5

Minimum of 8 characters, including both letters and numbers.

Select a Recovery Option Email

Email 6

Mobile

Email

United Kingdom 7

8 I agree to the [Terms of Use](#) (Updated 2018-09-01) and have read the [Privacy Notice](#) (Updated 2018-09-01).

9

Account Activation

Via Email:

Go to your email account, open the message and follow the instructions to activate your new account.

- If an email doesn't arrive, click **Resend**. If you end up with more than one verification email, use the most recent one.
- Sometimes the activation link in the email does not work properly if you open the email on a mobile phone. If this happens, use a desktop or laptop computer to open the email and activate your account.



Via Mobile phone:

On your mobile phone, find the text message with the verification code.

- Enter that code into the Enter Code Here field. Click Validate.
- If the message did not arrive, click **Resend**.
- If resending the message does not work, check the phone number where the code was sent. This number appears on the screen.

Further Reading Available

Need more information on FamilySearch Registration?
Or on any other topic? Learn more on the next slide!



Registering to use FamilySearch.org
Search Keywords: FamilySearch + Register

Want to learn more?

The previous slide displayed a **Further Reading Panel**:



To access the named **Help Centre Article**:

1. Click **Help** (top right corner of web page)
2. Click **Help Center** in drop-down menu.
3. Enter **Keywords** - or full article name - into the **Search Box** and click **Search**
4. Click the **Article Title** to display full text.



The FamilySearch Umbrella

Congratulations!

Assuming you have successfully followed the instructions given in the previous slides, you now have access to the FamilySearch website.

Since the Family Tree, Memories, Search and Indexing tabs are all housed under the FamilySearch website umbrella your access means you can use them all.

Although you can access a huge variety of individual documents on the FamilySearch website, it's most exciting and unique feature is Family Tree.

The ultimate goal for FamilySearch Family Tree is to record and link every person who has ever lived in a single, fully-sourced world-wide tree, interconnected to both their ancestors and descendants.



Family Tree Search Memories Indexing



One Worldwide Tree

Experience has shown that many of the issues encountered working in Family Tree, stem from a single basic misconception: people think they are working in their own private tree rather than contributing to a collaborative document.

When people see something they don't understand or didn't add themselves, quite often their first reaction is to "undo" it.

It's essential to realise that Family Tree is a single, public, open-edit tree which links the whole world together in families.

Want to learn more about Family Tree?

The **Further Reading Panel** below gives the title of an article on the Purpose of FamilySearch and Family Tree:



Purpose of FamilySearch and Family Tree
Search Keywords: FamilySearch + Purpose

Overview

The first page you see after signing-in to www.familysearch.org is your personalised **Home Page**. It opens the door to all the information and functions on the site.

You can use links on the home page to navigate to programme features within the website.

You can also access your profile information, view its settings to make changes to your FamilySearch account.

Let's now learn about these and other features placed at your fingertips on the FamilySearch home page.



FamilySearch Home Page Layout (Widescreen)

Sign in to www.familysearch.org to see your personalised home page:

The **left column** may contain:

- Motivational items
- “Find out how” instructions for performing tasks
- The latest memories connected to your relatives.

The screenshot shows the FamilySearch home page. The left column (red border) contains a banner for 'Jump-Start Your Ancestor Search!' with a photo of a man and woman looking at a tablet, and a 'Start Now' button. The right column (yellow border) contains a 'Recommended Tasks' section with a blue arrow pointing to it, and a list of ancestors including Thomas SPEECHLEY and Elizabeth SPEECHLEY.

The **right column** has tools and insights into your family history.

Sections include:

- Recommended Tasks
- Recently Viewed Ancestors
- To-do List
- Additional Information

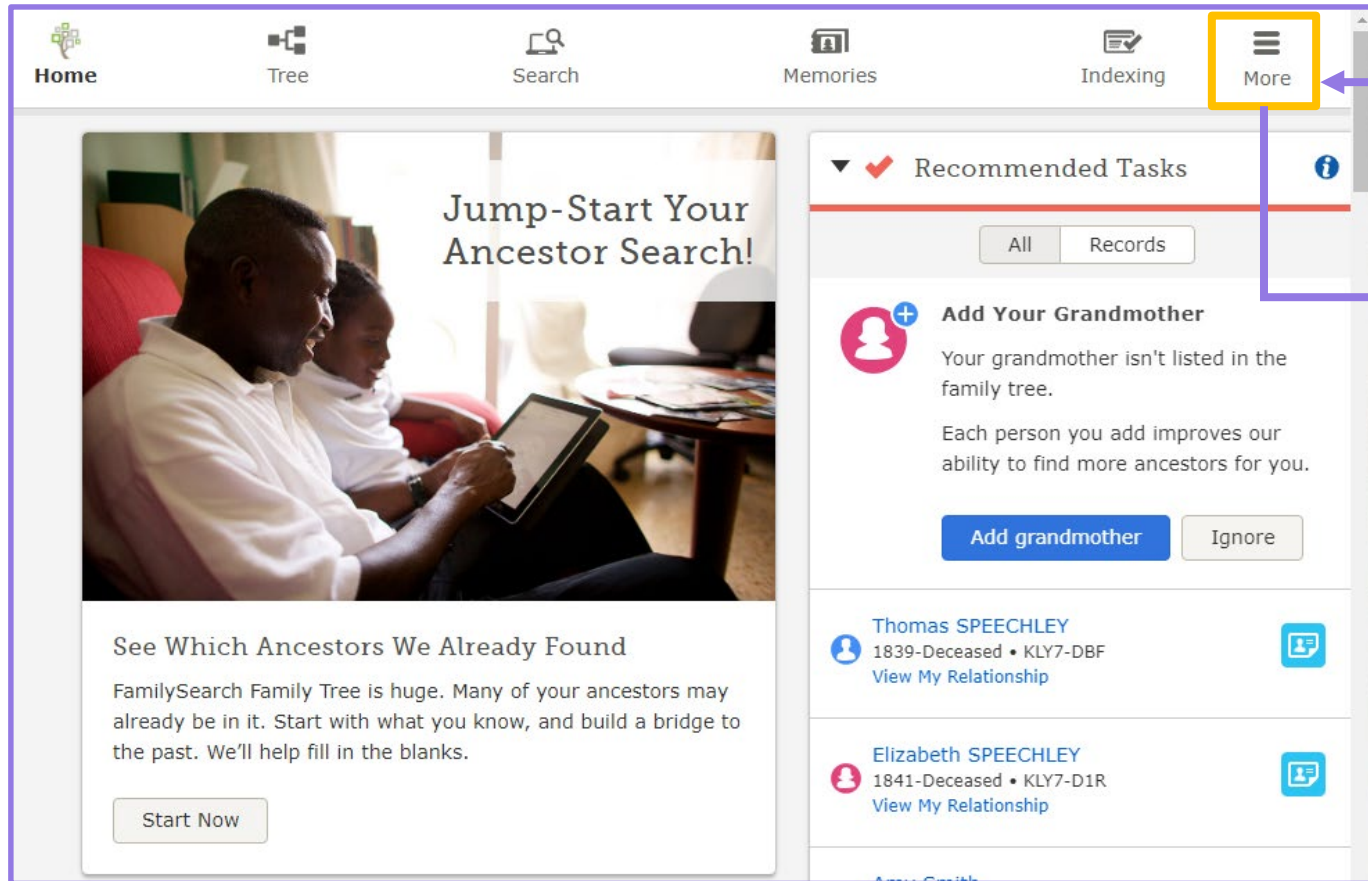


The content of the **Home Page** changes frequently. Take a few moments to become acquainted with any areas you've not used or seen before.



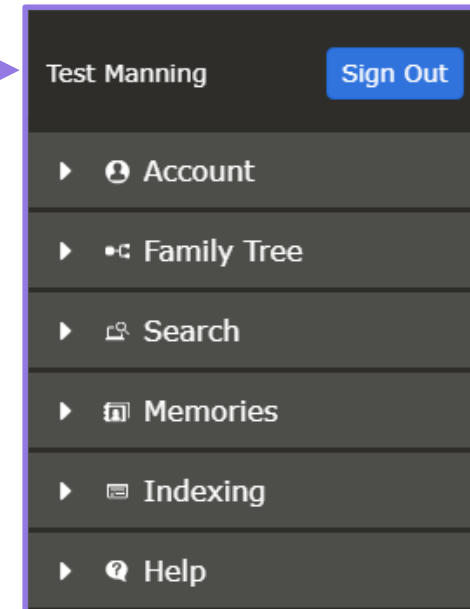
Personalized FamilySearch.org home page
Search Keywords: FamilySearch + Home + Page

FamilySearch Home Page Layout (Condensed)

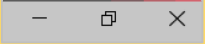


The FamilySearch Home Page operates slightly differently in condensed or 'portrait' view.

Click **More** to access the submenus, then Click on an icon to access the feature.



The condensed Home Page view may also appear if:

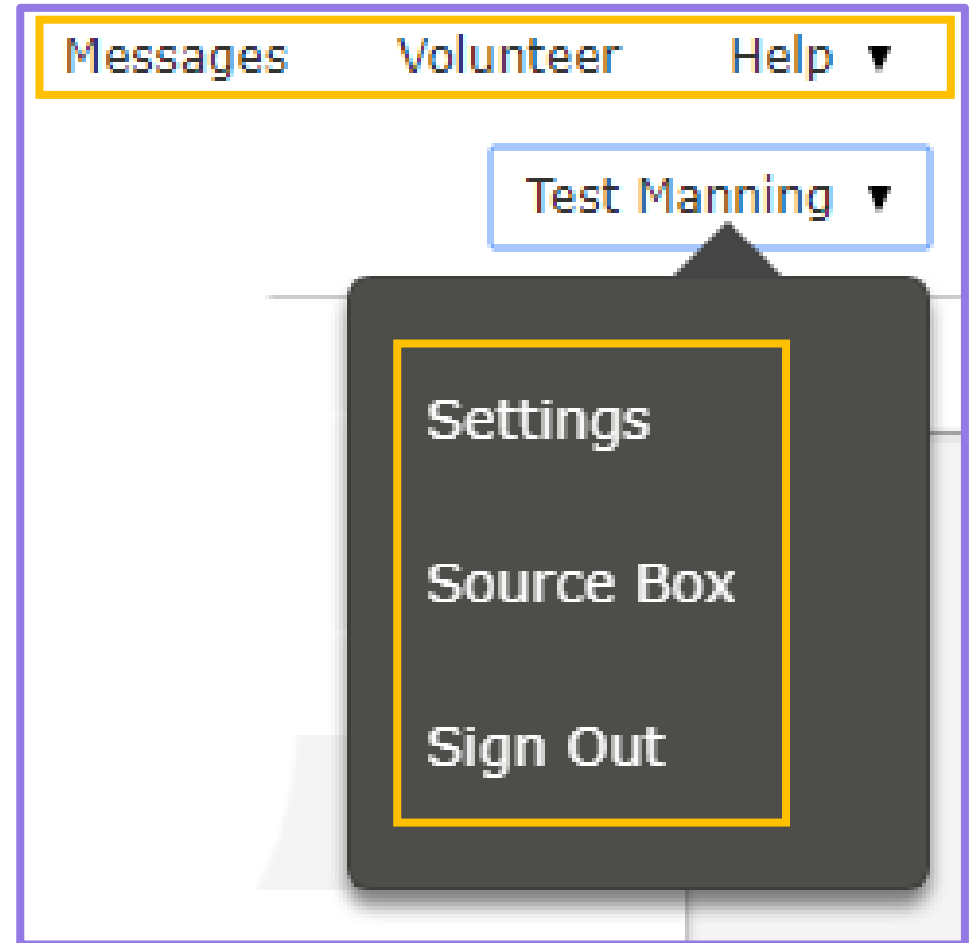
1. The window size is reduced - such as when viewing multiple programmes on one screen using the  icon (top right corner of screen) or
2. After using zoom (**Ctrl** and **+** for PC or **Cmd** and **+** for Mac)

Top Right Menu

This area of the **Home Page** is where you will find features that support the site's main tasks.

- **Messages** helps you collaborate with other contributors in FamilySearch. Click on it to see how it works.
- **Volunteer** provides links for people to help indexing historical records and so forth..
- **Help** items are explained in another module .

When you click on **your name**, a drop-down menu allows you to view and edit your **Settings**, access your **Source Box**, and **Sign Out** of FamilySearch. We will talk about the preferences you can set there.



Settings in Family Tree - Preferences

ACCOUNT

CONTACT

NOTIFICATIONS

PREFERENCES

CONNECTED ACCOUNTS

1. FamilySearch creates a beginning record known as the **Root Person** for each account. This individual is the person who created the account and cannot be deleted or changed to “deceased.” By default, the root person is placed in the middle of your pedigree view, between descendants and ancestors, in what is called the starting position as the **Starting Person**.
2. You can change the starting person by clicking on the circle below your name and entering the ID number of another family member (such as your father).

Display

Starting Person Test Manning L2X6-K2V **1**

Person ID Number **2**

[What's this?](#)

Preferred Email manningfh@btinternet.com

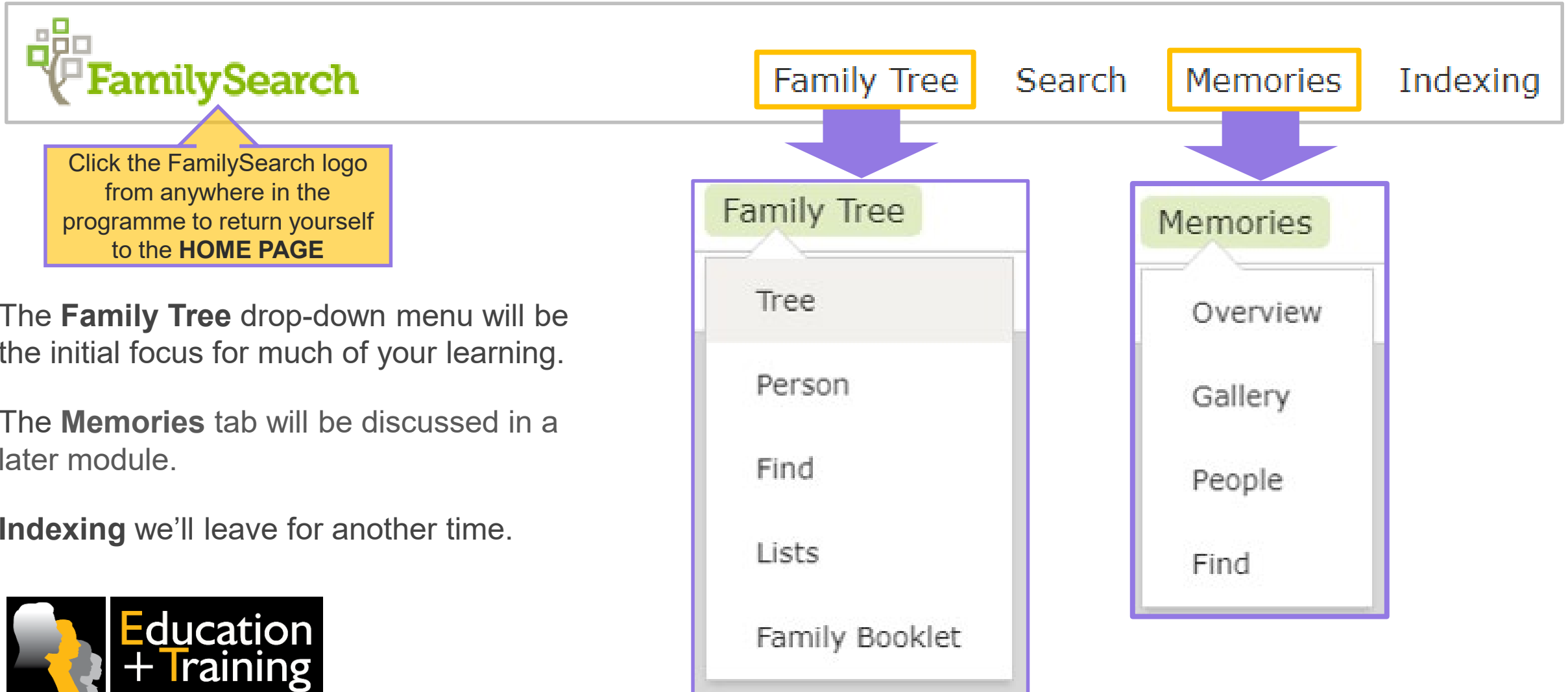
Preferred Language English



Make sure you explore all the tabs in **Settings**. Each tab controls a different aspect of how FamilySearch operates.

The Top Menu

Become familiar with the tabs and the drop-down menus (submenus) for each area shown below:



Click the FamilySearch logo from anywhere in the programme to return yourself to the **HOME PAGE**

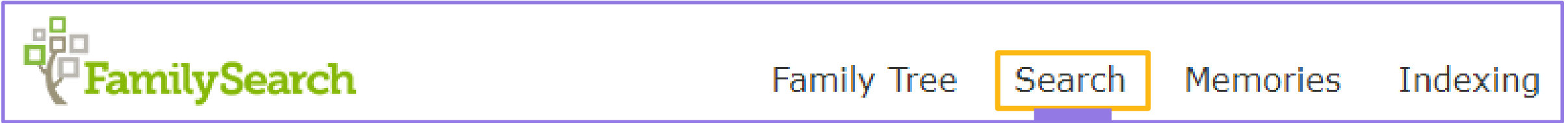
The **Family Tree** drop-down menu will be the initial focus for much of your learning.

The **Memories** tab will be discussed in a later module.

Indexing we'll leave for another time.



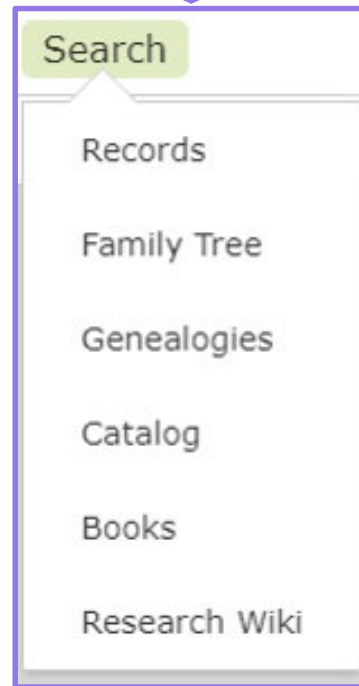
Drop-down Menu Links



Search has a link called **Family Tree**, used to locate people already entered into Family Tree (It is the same as **Find**). You will learn more about this feature in another module.

Genealogies contains records from the following sources:

- Ancestral File (AF)
- Pedigree Resource File (PRF)
- International Genealogical Index (IGI)
- Community Trees
- Oral Genealogies



Upload a GEDCOM here (see next slide)



Options and Tips for Searching FamilySearch Historical Records

Search Keywords: FamilySearch + Search + Tips

Searching for ancestors in the Genealogies section of FamilySearch

Search Keywords: FamilySearch + Genealogies

GEDCOM Files

You can **Upload a GEDCOM** file to FamilySearch.org. Once the file is uploaded, other users can search and view it as part of the Pedigree Resource File in **Genealogies**.

The **Pedigree Resource File (PRF)** is a good way to preserve your work and make it available to other people whilst retaining control of your file. Other people cannot change your file and your data is backed up regularly.

When uploading a GEDCOM file to FamilySearch.org, you can:

- Delete your GEDCOM file and replace it with an updated version.
- Transfer information from your file into Family Tree.

You cannot download a GEDCOM file from FamilySearch.org.

When using a GEDCOM to transfer data into Family Tree it's first uploaded into the Pedigree Resource File. However, nothing goes directly into Family Tree. This only happens as you manually compare each name with any already present.

For this reason we strongly suggest GEDCOM files intended for use with Family Tree should contain a maximum of 100 names. However, you will find that uploading only one family group at a time works better.



Creating a GEDCOM file

Downloading GEDCOM files from Family Tree

Uploading GEDCOM files and copying the information to Family Tree

Deleting a GEDCOM file that you submitted to the Pedigree Resource File

Search Keywords: FamilySearch + GEDCOM

Bottom Menu Links

Several important links are located at the **bottom** of the Home Page. These are the most commonly used features. **Click on each one** to become familiar with the information they contain:

About **Blog** Feedback Site Map Solutions Gallery Cookie Preferences English

THE CHURCH OF
JESUS CHRIST
OF LATTER-DAY SAINTS

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Clicking this logo hyperlinks to a Church website

- **Blog** contains interesting and useful articles submitted by FamilySearch users on current changes to FamilySearch and on various other family history subjects.
- **Feedback** allows you to leave suggestions or compliments *or* report a problem about FamilySearch.
- **Site map** provides direct links to *Core Products*, *News and Information*, *Get and Give Help*, and *Featured Pages*. If you cannot find something you think is on the FamilySearch site, look here.
- **Solutions Gallery** provides direct links to programmes and apps that are compatible with FamilySearch.
- **Language** allows you to select the language in which to display information in FamilySearch. Your menu may say “English” (or another language you have already selected) instead of “Language”.



Setting the language for familysearch.org
Search Keywords: FamilySearch + Language

Solutions Gallery

Solutions Gallery is a shop window for third-party software which is fully compatible with FamilySearch. Much of this software is either completely free or offers basic services for free. Icons provide direct links to download websites.



You'll find a huge variety of different applications to help with your family history work. Some favourites are Puzzilla, Relative Finder, RootsMagic and Legacy.

 If there's no Help Centre information about the software, full support is generally available from the site owner.



Relative Finder
★★★★★ FREE
Web
Relative Finder finds how you are related to your friends and to hundreds of famous people.



PUZZILLA
Web
Free Basic Services, Pr...
★★★★★




Legacy Family Tree, ...
Windows
FREE
★★★★★



RootsMapper
Web
Free
★★★★★ (1)

Enjoy exploring the Gallery!

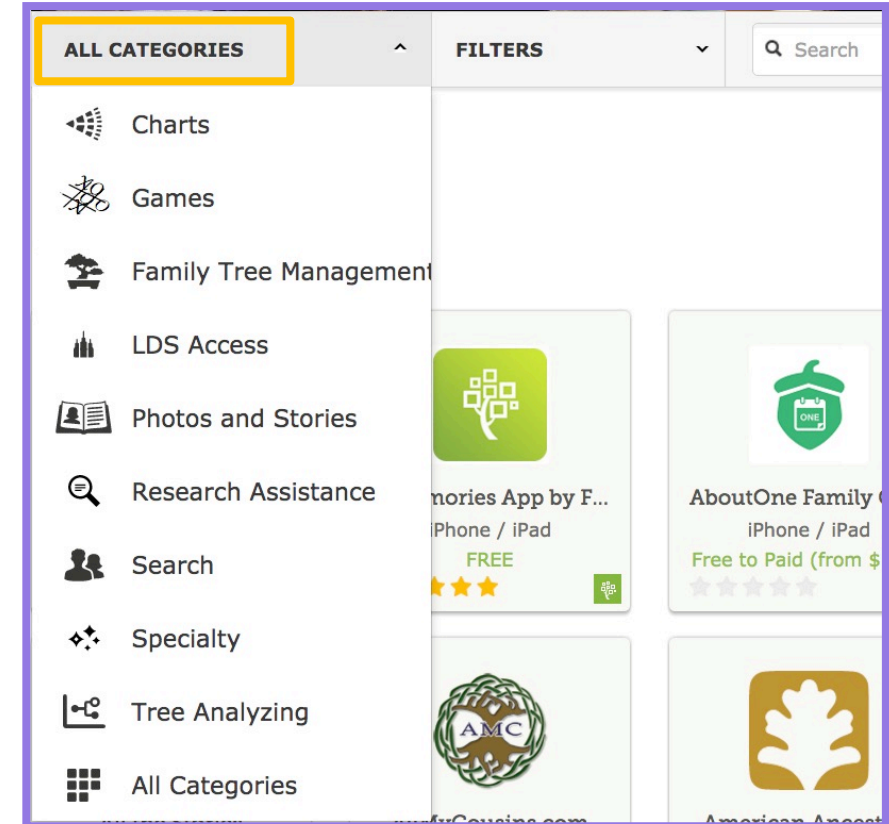
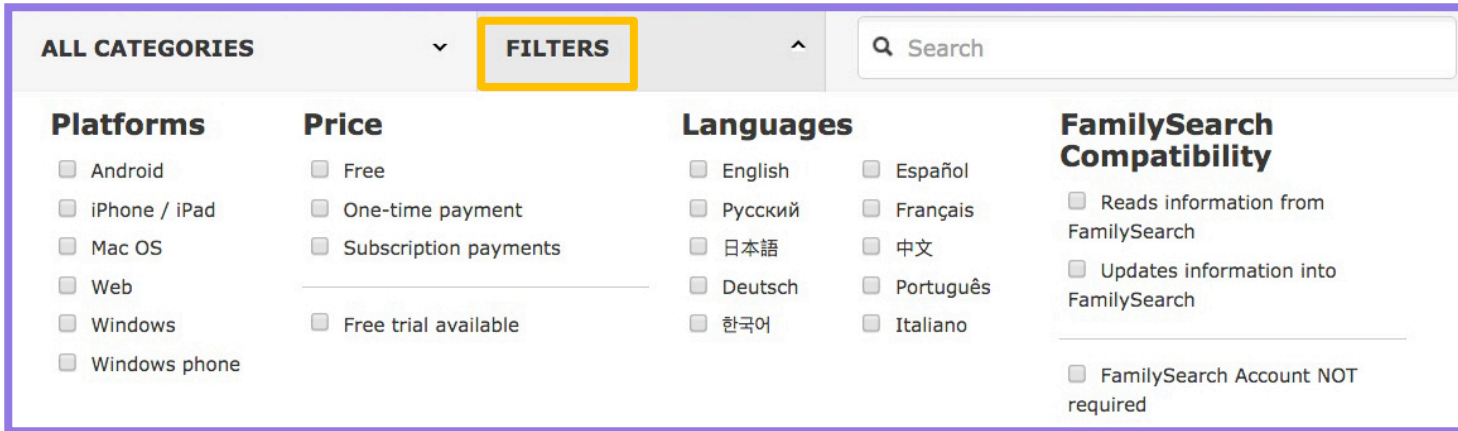


 Finding third-party family history products and services in the FamilySearch Solutions Gallery
Search Keywords: FamilySearch + Solutions

Searching the Solutions Gallery

When someone wishes to search for an application in order to accomplish a particular task, you should show them the Solutions Gallery and the **Search** box, **Filters** and **Categories** options.


Please visit the Solutions Gallery yourself and review the various categories and filters.



In the Solutions Gallery **Search** box, you must spell the application exactly as used by the site owner (including dashes and spaces).

Feedback and Legal Links

Sometimes people have a suggestion - or a complaint - about how the website functions. Should that happen to you, provide some **Feedback**. The default is **Suggestion or Compliment or Problem**.

[About](#) [Blog](#) [Feedback](#) [Site Map](#) [Solutions Gallery](#) [Cookie Preferences](#)  [English](#)

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When you register for a FamilySearch account, you agree to a legal document titled **FamilySearch Terms of Use**. This document covers the terms and conditions of use which protect FamilySearch.

The **Privacy Notice** is designed to protect you. This is where you will find answers to questions about how FamilySearch uses personal information.



 Patron feedback regarding FamilySearch products
Search Keywords: FamilySearch + Feedback

Build Your Confidence

On the following slides you will find a few 'real-world' scenarios.

Read each one carefully and think about what you would do in that situation. It may help to find the relevant Article in the Help Centre and explain the process in your own words.

Once people realise you know your way around FamilySearch Family Tree they may ask you for help! So if you know someone who's also working through these modules ... why not practise together?

The more experience you have in answering questions out loud, the more comfortable you'll feel when someone asks you for real!



Apply What You Have Learned

Scenario 1

Jim would like to change the starting person in his tree to his grandfather. Can you show him how to do that? He is new to doing family history work and gets confused.

Think about what Articles are available and what Help resources you show him in FamilySearch.org.

What should he do when he wants to change the starting person back to himself once he is done with his grandfather?



Solution provided on next slide – Have your answer ready before proceeding!

Apply What You Have Learned

Scenario 1

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Think about what Articles are available and what Help resources you show him in FamilySearch.org.

What should he do when he wants to change the starting person back to himself once he is done with his grandfather?



Solution: Have him click on his name in FamilySearch then click **Settings** in the drop-down menu. Click **Preferences**, click the **Button** below his name as starting person, type his grandfather's ID number into the box and click **Save Changes**. His grandfather will then show as the starting person. He simply reverses the process to change the starting person back to himself.

Apply What You Have Learned



Scenario 2

Maggie is upset because someone changed the death date and place of her ancestor. She attempted to contact the culprit through FamilySearch messaging.

How will she know if the other person responds to her message?

Can you access the relevant Help Centre article and show her where to find a reply from the person she contacted through FamilySearch messaging?

Apply What You Have Learned



Scenario 2

Maggie is upset because someone changed the death date and place of her ancestor. She attempted to contact the culprit through FamilySearch messaging.

How will she know if the other person responds to her message?

Can you access the relevant Help Centre article and show her where to find a reply from the person she contacted through FamilySearch messaging?

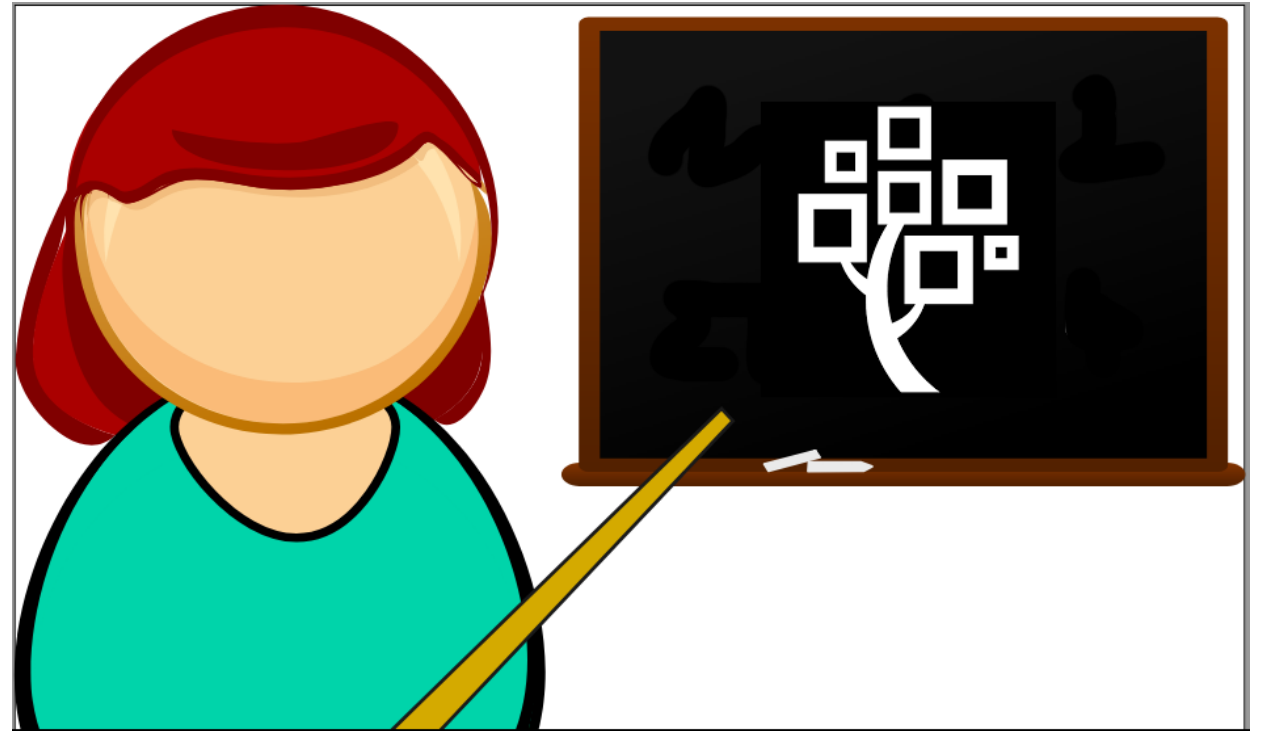
Apply What You Have Learned

Scenario 3

Jane has been asked to give a Family Tree demonstration for her local Family History Society.

But ... she doesn't want her personal information to be visible.

Can you advise her?



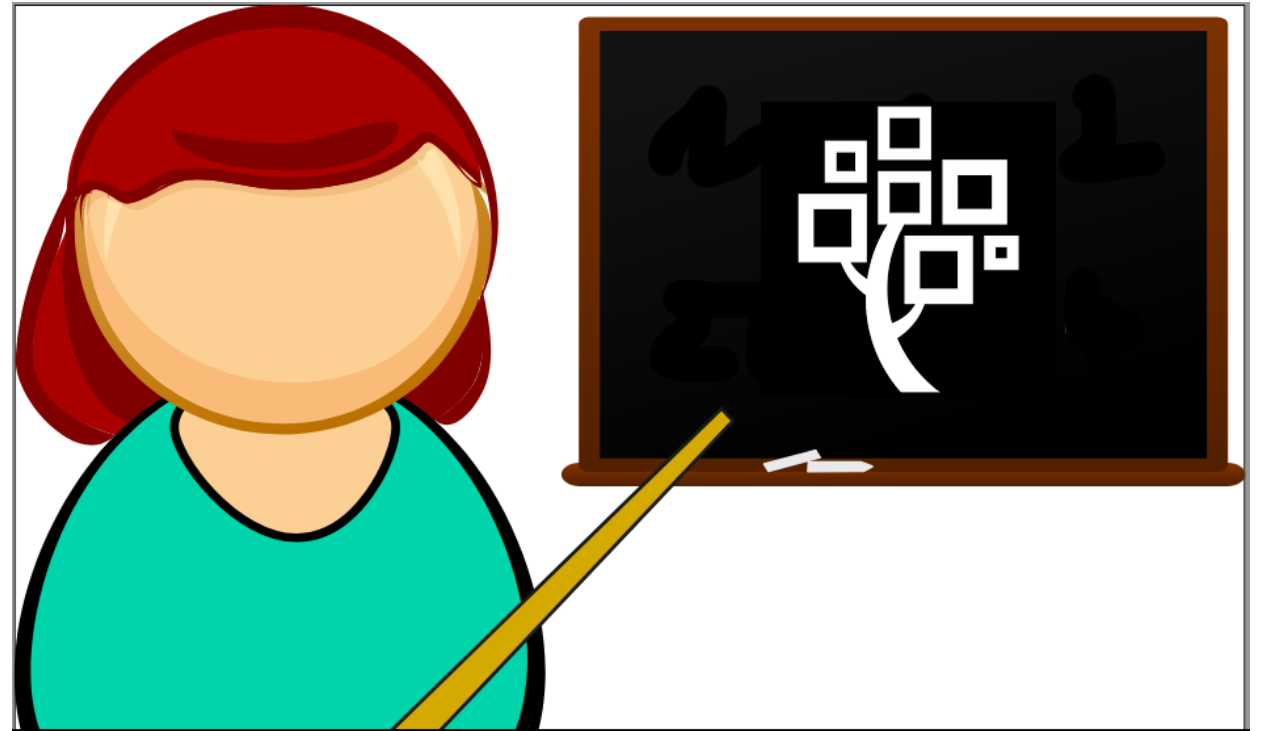
Apply What You Have Learned

Scenario 3

Jane has been asked to give a Family Tree demonstration for her local Family History Society.

But ... she doesn't want her personal information to be visible.

Can you advise her?



Solution: Have her click on her name in FamilySearch, click **Settings**, click **Preferences** and change the starting person to a deceased ancestor. That ancestor will then show as the starting person. (Same solution as Scenario 1)

Checklist

You should now be capable of the following:

- Changing the display language for your tree
- Accessing profile information, viewing settings and making changes to an account
- Finding articles about family history work and changes to FamilySearch
- Locating messages sent by another FamilySearch user
- Using the Site Map to navigate FamilySearch
- Sending a problem in Feedback
- Finding third party software programmes (Solutions Gallery)
- Viewing the terms, conditions, and privacy policy for using FamilySearch
- Locating your helper number
- Changing the starting person in Family Tree
- Upload names into Family Tree using a GEDCOM file



Congratulations!

You've just completed your first FamilySearch training module!

Any queries or suggestions regarding the module? Please email: fhf.modules@gmail.com