

FamilySearch and Family Tree



You will need: About 120 minutes and willing enthusiasm!

As a missionary in the Family History Department you have a major role in providing our patrons with a consistent quality experience. Whether on the phone, online, or in person, FamilySearch Support strives to provide patrons with a “delightful” world-class service experience that positively represents our work in the Family History Department and reflects the example of the Savior.

FamilySearch is the largest genealogy organization in the world. For over 100 years, FamilySearch and its predecessors have been actively gathering, preserving, and sharing genealogical records worldwide. Millions of people use FamilySearch records, resources, and services each year to learn more about their family history.

Family Tree is a new way to organize and record your genealogy online. It is free, available to everyone, and provides an easy way to discover your place in history with free tools to help you preserve and share your family’s story for generations to come.

Prepare (before the meeting!)

Below you will find links to resources that will help you understand more about the FamilySearch website and Family Tree. Please study the resources and complete the activities below.

Study

FAMILYSEARCH WEBSITE

In the FamilySearch website you can:

- Find records about your ancestors.
- Learn how to do family history research.
- Find a family history center near you.

Click the link below to view a video about the FamilySearch website.

[An Overview of FamilySearch.org](#) (06:23)

Click the links below to learn more about the FamilySearch website:

[How the FamilySearch Website Can Help You Using the FamilySearch Website](#)

Practice

Complete the following to sign-in to the FamilySearch website:

1. Go to <https://familysearch.org>.
2. In the upper right, click **Sign In**.

3. Type your LDS Account user name.
4. Press **Tab** and type your LDS Account password. **Note:** The next time you sign in, the system may auto fill your password.
5. **Tip:** Click **Stay signed in to 2 weeks** if desired.
6. Click **Sign In**.
7. Briefly explore some of the options on the FamilySearch website.

What Did You Learn?

- How would you explain the purpose of the FamilySearch website to a friend or family member?

- What did you learn about the FamilySearch website that you did not know before? _____

Study

GET HELP

The FamilySearch Help Center has many resources to help patrons understand how to use FamilySearch products and resources.

In addition, Research Assistance allows a patron to ask a specialist for general research help or search online research articles.

Get Help includes the following options:

- Help and Learn
- Call Us
- Live Chat
- In–Person Help
- Send a Message

Help and Learn includes the following choices:

- Help and Learn Home
- Product Support
- Research Assistance
- Getting Started Guide
- Learning Center Video Courses
- Research Wiki

Note: If you click Get Help from Family Tree, Research Assistance and Research Wiki will not be on the list of choices.

Click the link below to learn more about the Help Center in the FamilySearch website.

[Using the Help Center in FamilySearch and Family Tree](#)

Practice

1. At the upper left, click the FamilySearch logo to return to the home page.
2. At the upper right, click **Get Help**.
3. On the right side of the menu, click **Help and Learn Home**.
4. Under “What kind of help do you need?”, click **Product Support**.
5. Review the options on the page.
6. Return to the top of the page.
7. **Tip:** The tabs at the top of the page will move to other pages like Research Assistance.

What Did You Learn?

1. What topics are available in Product Support?

2. What else can you do on this page?

Study

FAMILY TREE

In Family Tree you can:

- See what the system already contains about your ancestors.
- Work with others to fill in missing information and correct errors.
- Add photos and stories and link them to your ancestors.
- Add sources and explanations to show that information is accurate.
- Find and merge records that are about the same person.

Click the link below to view a quick start video about Family Tree.

[Quick Start to Family Tree](#) (04:04 minutes)

Click the link below to open and **briefly review** the Family Tree job aid.

[Quick Start to Family Tree](#) (11 pages)

What Did You Learn?

- How would you explain the purpose of FamilySearch Family Tree to a friend or family member?

Study

NAVIGATING THE FAMILY TREE

When you see your family information in the pedigree view (default), you can display more generations, resize the tree, move families to different places on the screen, and change to different spouses or parents if more than one is available.

Click the link below to learn about using the pedigree view:

[Navigating the Pedigree View](#)

Practice

1. At the top center, click **Family Tree**.
2. At the top left, click **Pedigree View** if you are in the Fan Chart view.
3. **Note:** When you point to the background of the pedigree view, your mouse pointer will display as a four-headed arrow.
4. Press and hold the left mouse button then drag your mouse to move the tree around on the screen.
5. Use the chart in the Navigating the Pedigree View document (link above) to do the following:
 - a. Expand the tree to the next generation of a family line.
 - b. Display the children of a couple on the tree.
 - c. Display the list of other husbands or wives if available.
 - d. Increase or decrease the size of the FamilySearch Family Tree.
 - e. Move the tree to the left, right, down, or up.
 - f. Recenter the tree.

What Did You Learn?

- Explain how you will teach your family members, friends, and ward members to navigate the pedigree view in Family Tree? _____

- What do you want to remember about what you have learned? _____

Study

PERSON SUMMARY CARD

The person summary card is a useful navigation tool that you can use in many places throughout Family Tree. It lists basic facts about a person. You can also use it to put a person in the main position of the tree and view the person's details page.

You can display a person's summary card from your Family Tree, from the details page of a family member, and from the search results. To display the card, click a person's name. The summary card appears as a pop-up on top of whatever else is shown on the screen.

You can do the following on a summary card:

- See the person's portrait photo if one has been uploaded.
- See the number of sources, discussions, photos, and stories that are attached to this person.
- See the person's name and basic events.
- See the ID number (formerly called the person identifier). This number identifies each person in the system. It appears directly beneath the name.
- See information about temple ordinances for the person.
- To display this person in the main position of Family Tree, click **Tree**.
- To display the person's details page, click **Person**.
- To display the person's sources, click **Sources**.
- To display the person's discussions, click **Discussions**.
- To display the person's photos, click **Photos**.
- To display the person's stories, click **Stories**.
- To watch the person, click **Watch**. To unwatch the person, click **Unwatch**.

Practice

1. In the pedigree view, navigate to a person in the tree.
2. Click the person's name.
3. Review the information on the person's summary card.
4. Click **Tree**.
5. What happened? _____
6. How would you display the summary card again? _____
7. Click **Photos**.
8. What happened? _____
9. **Tip:** Click **View Tree** to return to the tree.

What Did You Learn?

- How would you help a friend or family member understand the purpose of a person's summary card? _____

Study

PERSON DETAILS PAGE

Each person on the tree has a details page that shows all of the information about him or her. From the details page you can also add information about a person, correct information, attach sources, and participate in discussions. You can display the details page from almost anywhere in Family Tree.

A person's details page is divided into the following sections:

- Vital Information
- Other Information
- Family Members
- Sources
- Discussions
- Temple Ordinances

Tip: Quickly jump to a specific section from the following links at the upper left:

- Vitals
- Other
- Family
- Sources
- Discussions
- Ordinances

Practice

1. In the pedigree view, navigate to a person in the tree.
2. Click the person's name to display the summary card.
3. Click **Person** to display the details page.
4. What information is in the Vital Information section? _____

5. At the top left click **Temple**.
6. What information is in the Temple Ordinances section? _____

7. What information is in the Family Members section? _____

8. At the top left under the person's name, rest the mouse pointer on **Watch**. The following screen tip will be displayed: "Be notified of updates to this person and add to my watch list."

What Did You Learn?

- What information will be important to you on the details page? _____

- How would you help a friend or family member understand the purpose of a person's details page? _____

Study

HELP OTHERS

As a FamilySearch Church-service missionary, you will assist patrons who have questions about Family Tree. Sometimes it will be necessary to use the helper function.

The helper function should be used to:

- Assist the patron in learning how to enter or edit information into the Family Tree.
- View and understand the patron's concerns.

Click the link below to learn about how to use the helper function in Family Tree.

[Using the Helper function in Family Tree](#)

Remember, Support agents *should not* make changes for the patron. Use the Helper function *only to view* the patron's tree.

Practice

1. **Note:** You will need a partner to practice using the helper function.
2. Obtain the following information from your partner:
 - a. Contact name.
 - b. Helper number.
3. **Tip:** The contact name and helper number can be found under Settings. If your partner does not have this information, have him or her complete the following:
 - a. Sign in to FamilySearch.
 - b. At the upper right, click their name.
 - c. From the drop-down list, click **Settings**.
 - d. Scroll down and locate the contact name and helper number.
4. At the top center, click **Family Tree**.
5. At the top right, click **Help Others**.
6. Type the contact name.
7. Press **Tab** and type the helper number.

8. Click **Submit**.
9. **Note:** A brown bar will be displayed on the right side of your screen.
10. Now you can go to a person in Family Tree and see the same thing as the person you are helping.
11. Complete the following to stop the helper function.
 - a. At the top of the brown bar, click the **x**.
 - b. Click **Stop**.
12. The brown bar is removed.

What Did You Learn?

1. When should you use the helper function? _____

2. What should you *not* do while using the helper function? _____

Teach One Another (in the meeting!)

Ask your questions!

You have had a few excellent experiences preparing for today's meeting. Be sure to ask as many questions as you can. Share your experiences with other missionaries, training assistants, and instructors.

Discussion

Come prepared to discuss and share ideas about the following in the learning meeting:

- The FamilySearch website.
- The FamilySearch Family Tree.

Ponder and Prove (after the meeting!)

Observe

During training you will have the opportunity to learn many things. As you make an effort to prepare and then participate in the learning meetings, you will have a positive joyful experience.

Participate in a small group discussion with your TA. Come prepared to discuss questions about:

- The FamilySearch website.
- The FamilySearch Family Tree.

What did you learn?

Record some goals regarding what you have learned today.

- I will spend at least one hour every day in Family Tree. _____

- _____

- _____

- _____

Ask your questions! Answer theirs.

Log in to Skype, and have a meaningful discussion about the FamilySearch website and Family Tree with your fellow support missionaries.

Be sure to answer at least one question or make at least one comment via Skype.