Global Oral Genealogy

Pedigree Entry Tool (PET) User Instructions v1

- Stable and consistent internet access is required while using the Pedigree Entry Tool.
- Before Proceeding, ensure that you can log into your FamilySearch.org account and you have sent your username to the owner of the company or your production manager to grant you access to the tool. Do not make another FamilySearch account if you already have one.
- Training questions should be directed to your Operations Manager.
- Technical questions should be posted on the Oral Gen WhatsApp Support Channel.

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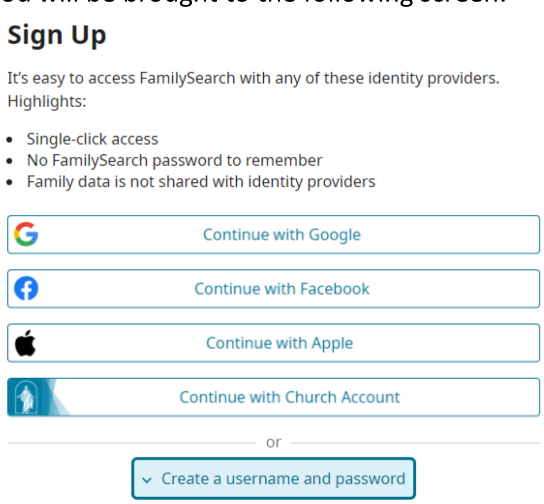
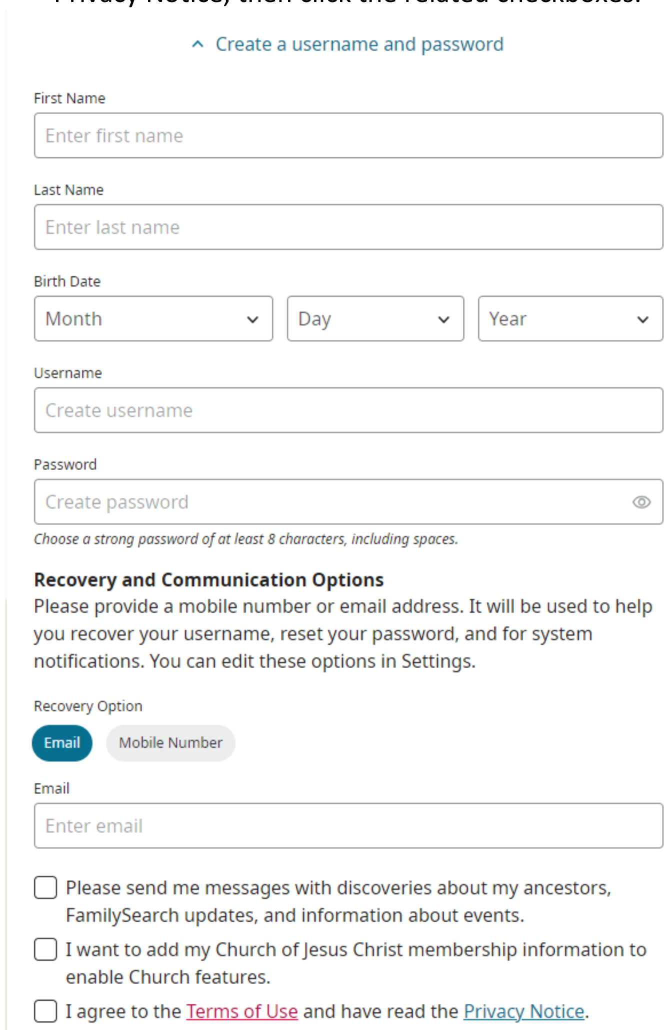
Creating a free FamilySearch account:

If you already have a FamilySearch account, go to step #6.

1. Go to www.familysearch.org
2. On the top right of the webpage you will see "Create Account". Click on this button.
3. You will be brought to the following screen:

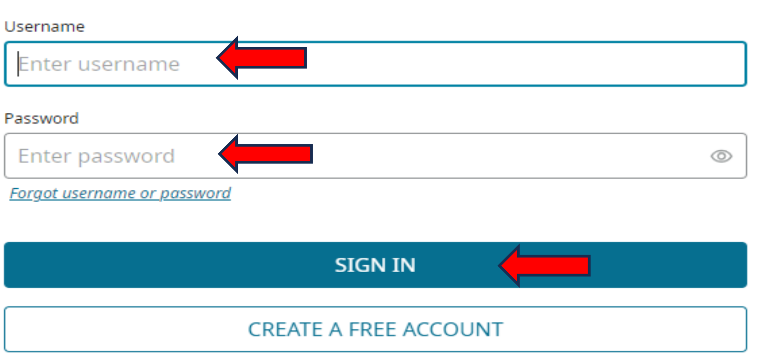


4. Click on “Create a username and password”
5. After you click on “Create a username and password”, complete the form:
    a. Enter your first (given) name (Not the name of your contractor or manager)
    b. Enter your last (family) name
    c. Enter your date of birth (Month, Day, Year)
    d. Create a username that you will remember.
    e. Create a password that you can remember.
    f. Enter a personal recovery email address or mobile phone number just in case you forget your password or username.
    g. Before Clicking the “Done” button at the bottom of the form, read the Terms of Use and Privacy Notice, then click the related checkboxes.



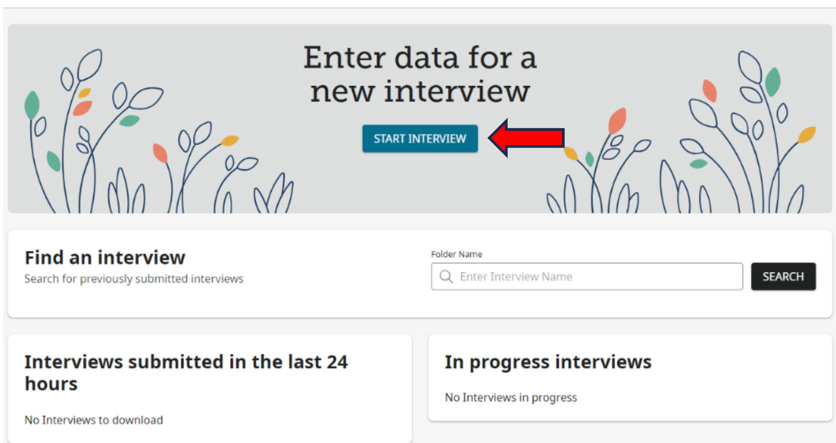
Logging into the PET:

6. Navigate to www.familysearch.org/en/oral-gen/dashboard and sign in with your FamilySearch account.

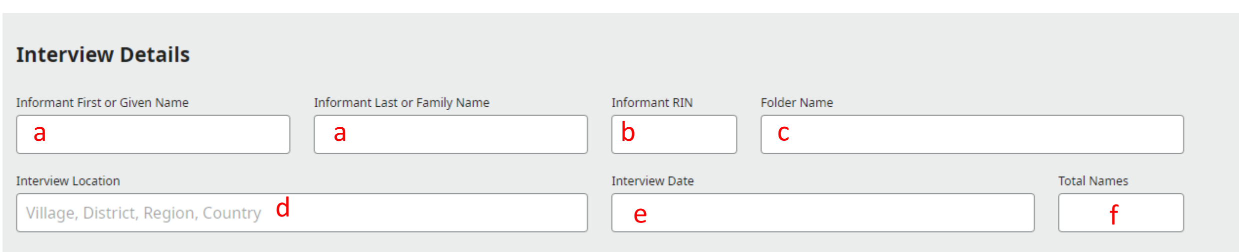


Data Entry Clerk:

7. A personal dashboard will be displayed and ready for you to start transcribing the Paper Oral Genealogy Interview Collection Form.
8. To start transcribing the paper collection form, click the “Start Interview” button.



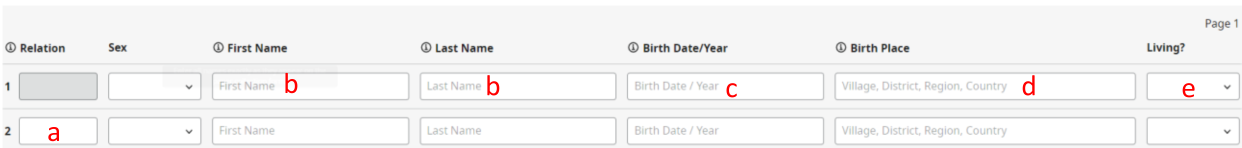
9. With the Interview Collection Form in hand, complete the following steps to transcribe the interview.



a) From the Header of the Paper Collection Form, transcribe the First or Given Name(s) AND the Last or Family Name(s) of the informant into the first two boxes. ***The first (given) name is in a different field than the last (family) names. Informant Age is no longer a required field in the header.***

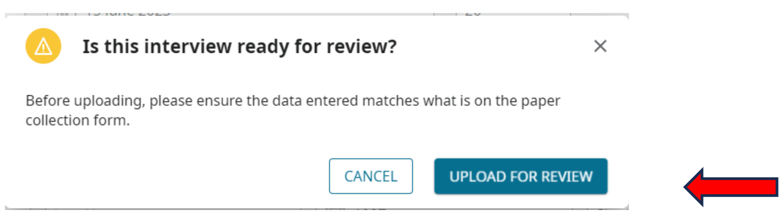
b) Find the informant/Interviewee on the Collection Form and type in the Record Identification Number (RIN) that is associated with them.
c) Enter the Folder Name (found in the Mobile App output zip file) in the following format: “XX999_999_99999999_9999”
d) Enter the Interview Location (4 locations, separated by 3 commas) in this format: Village, District, Region, Country -OR- Village, LGA, State, Country.
e) Enter the date the interview was captured.
f) Enter the total number of names in the interview.

10. After the completion of the Interview Details Header section, start transcribing the Interview Collection Form exactly as written.

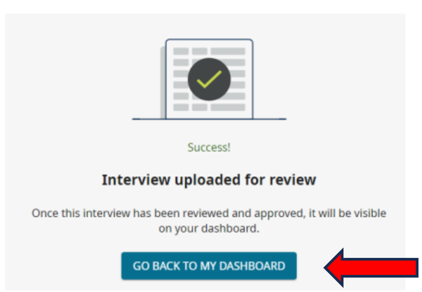


a) The “Relation” column is for the relationship codes: P (parent), S (spouse), or C (child) followed by the RIN of the related individual. For example, if RIN #2 is the spouse of RIN #1 the relation code for RIN #2 would be S1.
b) All First (given) and Last (family) names known and provided by the informant should be entered. ***An interview with a majority of first names only will not be accepted.***
c) Enter all birth dates or birth years provided by the informant. Birth dates or birth years should not be estimated. Birth dates or birth years are only required for the informant and their immediate family.
d) Enter the birth place (4 locations, separated by 3 commas) in this format: Village, District, Region, Country -OR- Village, LGA, State, Country. Birth Places are only required for the informant and their immediate family.
e) The “Living?” column must be completed for all individuals. If the dropdown is set to “No”, enter a Death Date and Death Place if known. Death dates and places are not required fields.

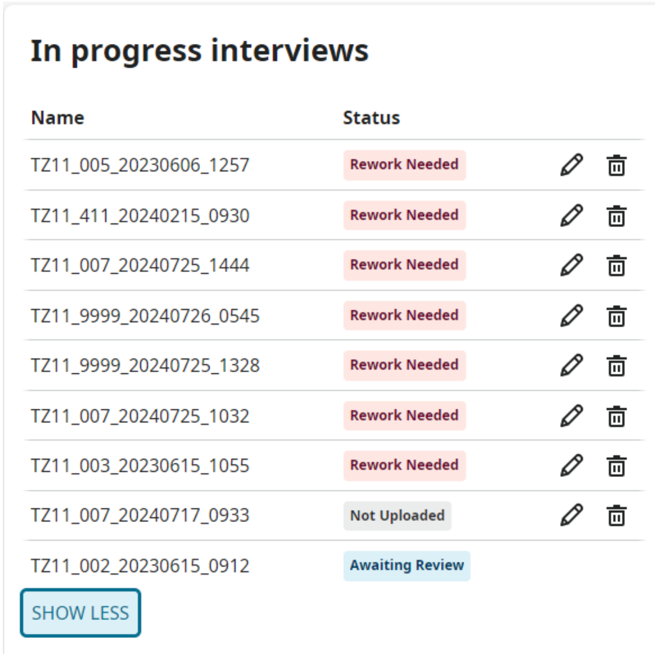
11. When the interview transcription is complete and ready for a quality review, click on “Upload For Review” in the top right of the webpage. A dialogue box will appear to confirm if this interview is ready to be uploaded. Click “Upload for Review.”



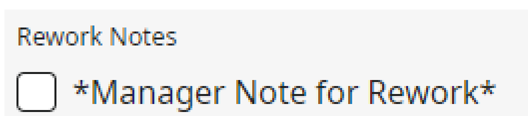
12. After uploading the interview, you will see the following screen. Click “Go Back to My Dashboard” to transcribe another interview.



13. On your dashboard you will be able to see all interviews that you have created and the status of those interviews in the “In progress interviews” section.

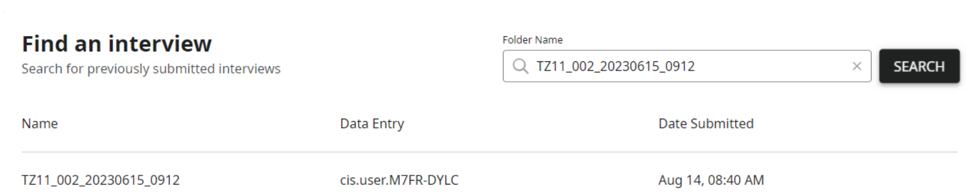


14. If the status of your interview is “Rework Needed”, click on the pencil icon, read the manager’s note, and make the requested changes.



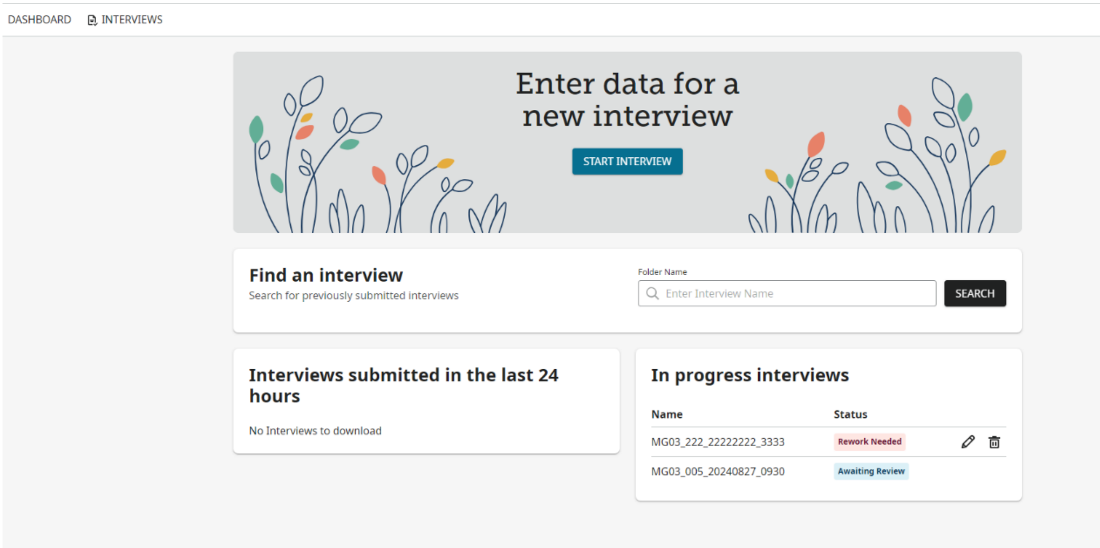
15. After the corrections have been made, click on the checkbox next to the manager’s note and upload again for further manager review.
16. When the manager approves your interview, you will then see interview in the “Interviews submitted in the last 24 hours” location of your dashboard.

17. If you need to search for an interview that you do not see on either the “In progress interviews” or “Interviews submitted in the last 24 hours” sections, you may use the “Find an interview” section by typing in the <u>entire</u> interview folder name into the field and clicking on the “Search” button.



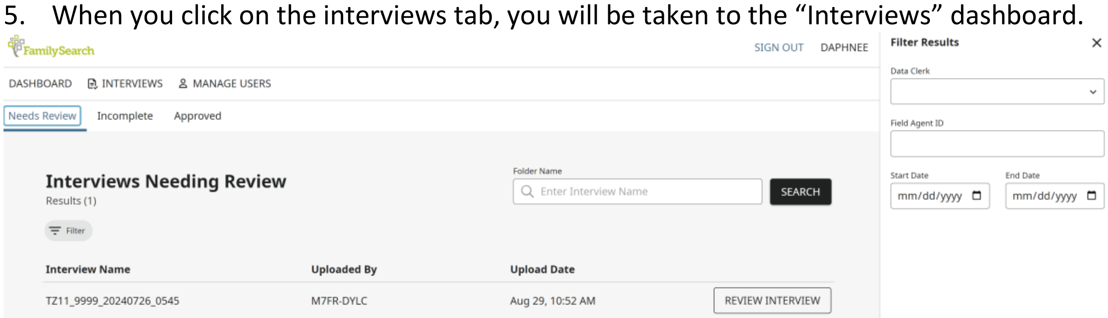
QA Manager Responsibilities:

1. If you are a Quality Assurance (QA) Manager for your organization, you are responsible for making sure the transcribed interview reflects what is written on the paper collection form.
2. When you log into www.familysearch.org/oral-gen/dashboard you will see the following screen:

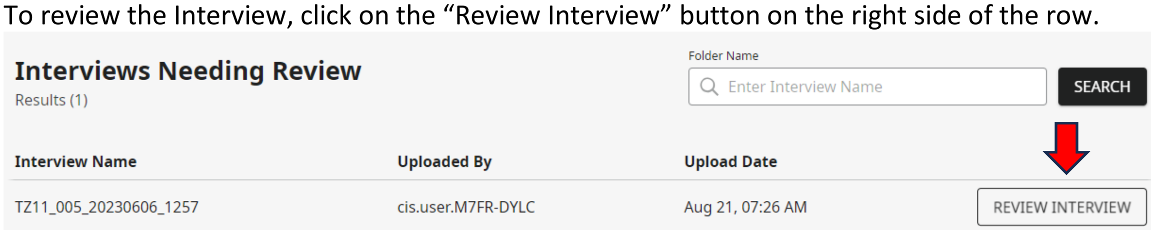


3. You have rights to create and edit interviews, and you can also approve or reject the work of other data entry clerks.
4. On the top of the webpage, you will see a tab labeled "Interviews"

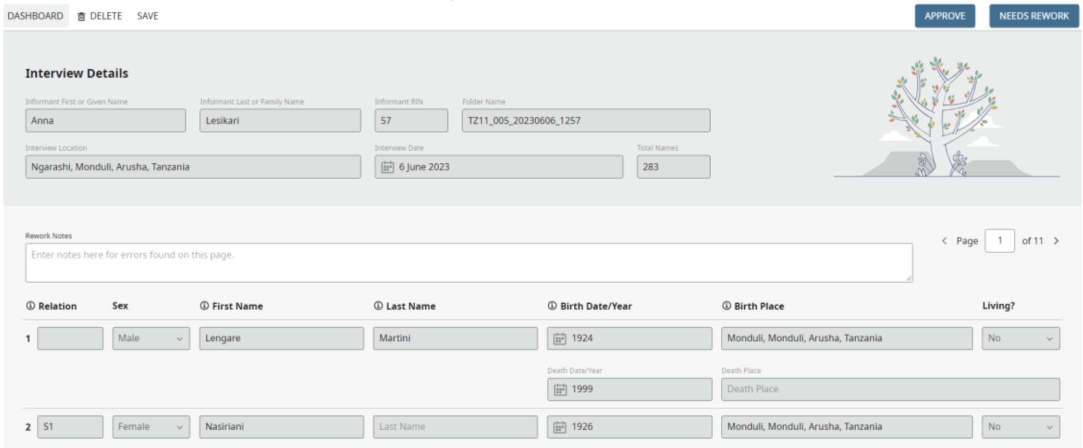
5. When you click on the interviews tab, you will be taken to the "Interviews" dashboard.



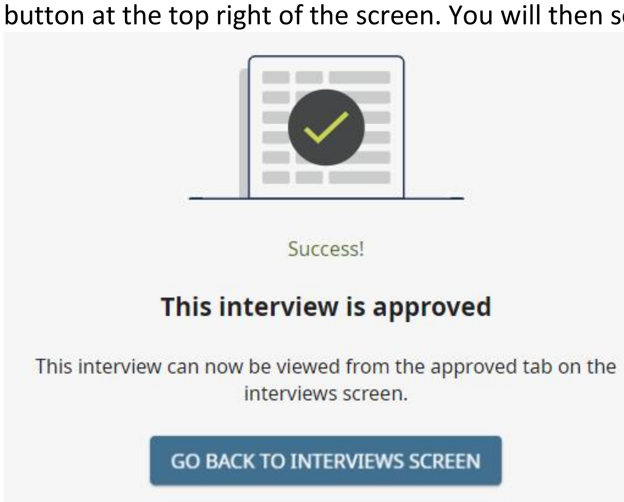
6. If there are any interviews in need of review, you will see them when you click on the "Needs Review" tab.
7. To review the Interview, click on the "Review Interview" button on the right side of the row.



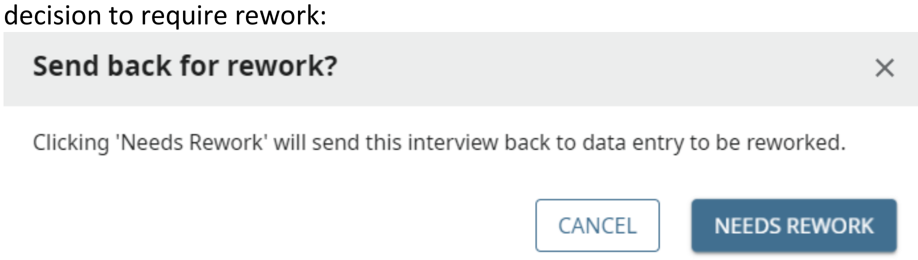
8. You will then be taken to a “Read-only” version of the interview.



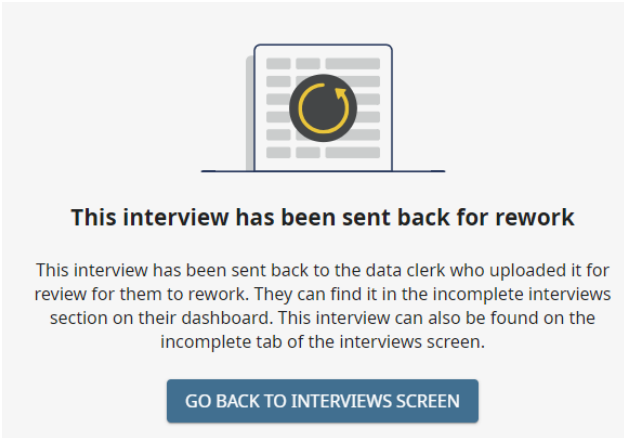
9. With the paper interview collection form in hand, begin auditing the transcription to determine if the online transcription is accurate or needs to be reworked.
10. If the interview does not need rework, approve the Interview by clicking on the “Approve” button at the top right of the screen. You will then see the following screen:



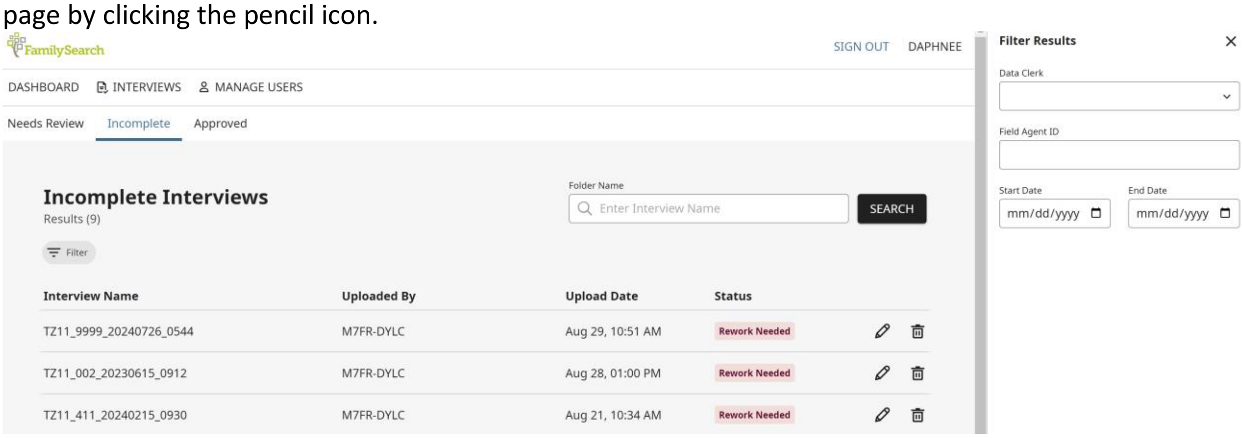
11. If the transcription needs to be reworked, write the needed correction in the “Rework Notes” section underneath the interview header. Then click on the “NEEDS REWORK” button on the top of the page. You will then see the following dialogue box appear asking you to verify your decision to require rework:



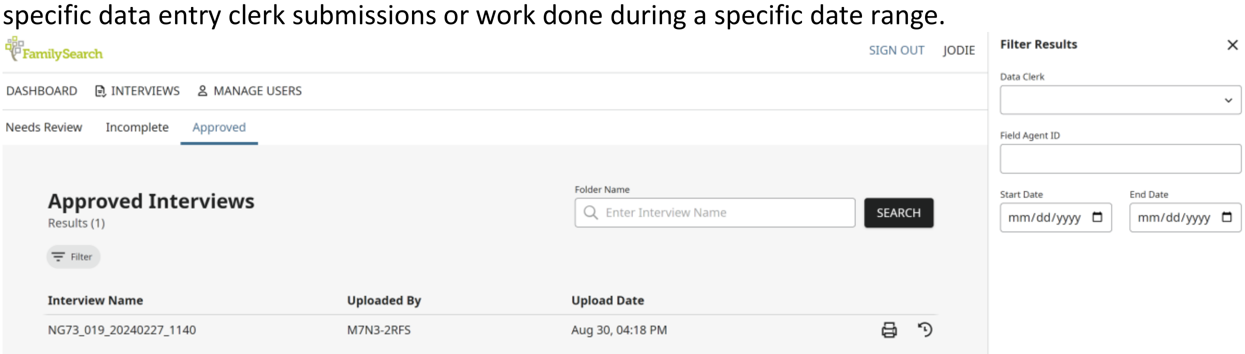
12. If you confirm that this interview needs rework by the data entry clerk, you will see the following confirmation screen.



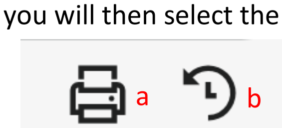
13. On returning to the interviews screen, click the "Incomplete" tab to see if there are any incomplete interviews that data entry clerks need to complete.
14. If the rework for an interview is quick to fix, you may rework that interview yourself from this page by clicking the pencil icon.



15. On the interview screen, click the "Approved" tab to see all the interviews that have been approved and are ready for booklet printing. You will also see a filter option to search for specific data entry clerk submissions or work done during a specific date range.



16. To print the family booklet, click on the printer icon (a) on the right of the interview. This will open the print dialog screen where you will then select the printer.



NOTE: Booklets should be printed within 30 days of receiving payment. This information will be available on the CAT.

17. From the “Approved” tab you can also send an interview back to rework by clicking the clock icon (b). This button should only be used if the interview was approved in error.

Production Manager Responsibilities:

1. After logging in, a Production Manager will see these following tabs on the top of the screen:

   DASHBOARD INTERVIEWS MANAGE USERS

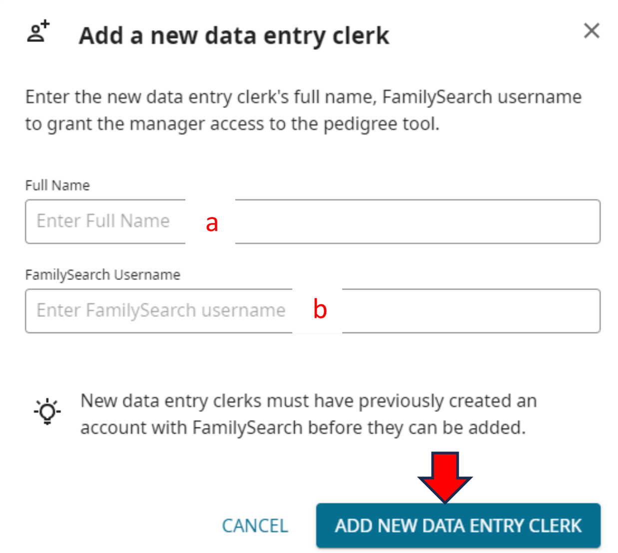
2. Select “Manage Users” to add QA Managers and Data Entry Clerks.

   Managers QA Managers Data Clerks

3. To add a Data Entry Clerk, click on the “Data Clerks” tab and then click on the “ADD NEW DATA ENTRY CLERK” button on the right side of the screen.

   ADD NEW DATA ENTRY CLERK

4. A dialogue box will appear where you will enter (a) the full name of the Data Entry Clerk and (b) their FamilySearch username. After both fields are entered, click “ADD NEW DATA ENTRY CLERK.” **If a FamilySearch username was not previously set up for this data entry clerk, you will see the following error: “User could not be added. Please contact support.”**



5. After each Data Entry Clerk is added, they can now transcribe interviews.
6. To add a QA Manager, click on the “QA Managers” tab and then click on the “ADD NEW QA MANAGER” button on the right side of the screen.

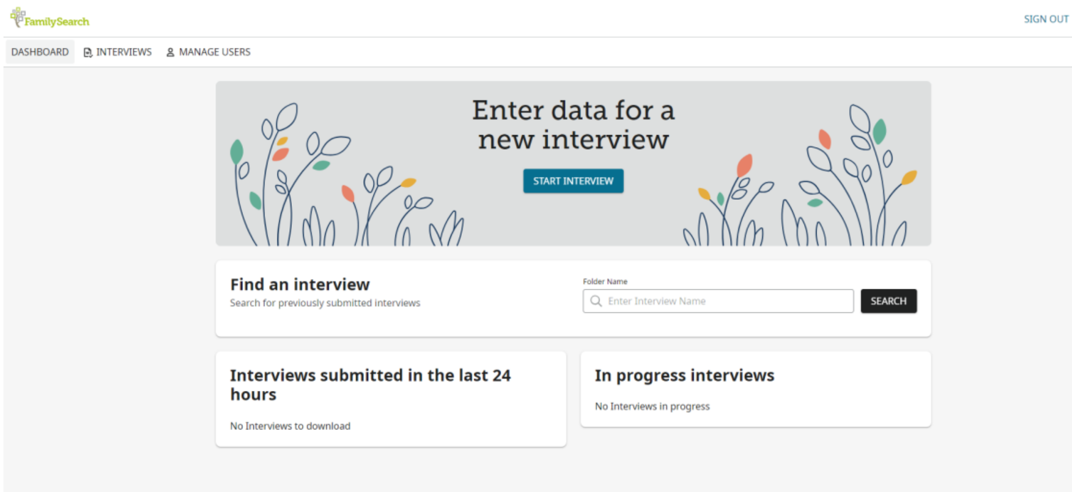
   ADD NEW QA MANAGER

7. A dialogue box will appear. Enter the QA Manager’s full name and FamilySearch username.
8. After each QA Manager is added, they can now review and transcribe interviews.
   If your QA Manager also does data entry work, do not attempt to add a user as both a QA Manager and Data Entry Clerk.

Owner Responsibilities:

- Before proceeding, ensure you can log into your FamilySearch.org account and you have sent your username to your Operations Manager so the Systems Administrator can grant you access to the PET.

1. After logging into the PET, your personal dashboard will be displayed and ready for you to add new Managers and Data Entry Clerks.



2. For instructions on assigning Managers and Data Entry Clerks, please refer to the Production Manager section of this document

Helper Mode:

If you are talking to a FamilySearch User Support Technician on the WhatsApp support group and are asked for your Helper Number, click on the Help Icon ? on the top right of the screen (near your name) and provide the Helper Number to the Support Technician in a Private Reply. Never give your Helper Number to anyone else.