

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.

Table of Contents:

• How to create a Free FamilySearch account	Page 1
• Logging into the PET	Page 3
• Data Entry Clerk	Pages 3
• QA Manager Responsibilities	Pages 6
• Production Manager Responsibilities	Pages 9
• Owner Responsibilities	Pages 10

Creating a free FamilySearch account:

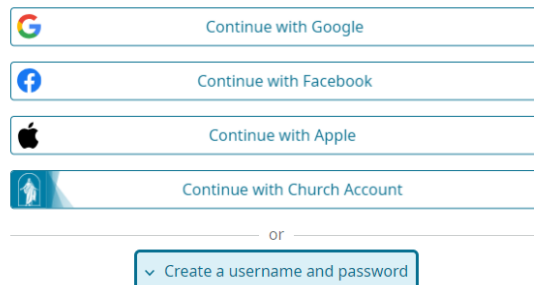
If you already have a FamilySearch account, go to step #6.

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:

Sign Up

It's easy to access FamilySearch with any of these identity providers.
Highlights:

- Single-click access
- No FamilySearch password to remember
- Family data is not shared with identity providers



The screenshot shows the 'Sign Up' screen on FamilySearch.org. It features four social login buttons: 'Continue with Google', 'Continue with Facebook', 'Continue with Apple', and 'Continue with Church Account'. Below these is a horizontal line with the word 'or' in the center. At the bottom is a button labeled 'Create a username and password' with a small downward arrow icon.

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.

[^ Create a username and password](#)

First Name

Last Name

Birth Date

Month

Day

Year

Username

Password

Choose a strong password of at least 8 characters, including spaces.

Recovery and Communication Options

Please provide a mobile number or email address. It will be used to help you recover your username, reset your password, and for system notifications. You can edit these options in Settings.

Recovery Option

Email

Mobile Number

Email

☐ Please send me messages with discoveries about my ancestors, FamilySearch updates, and information about events.

☐ I want to add my Church of Jesus Christ membership information to enable Church features.

☐ I agree to the [Terms of Use](#) and have read the [Privacy Notice](#).

Logging into the PET:

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

Username
Enter username

Password
Enter password

[Forgot username or password](#)

SIGN IN

CREATE A FREE 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.

Enter data for a new interview

START INTERVIEW

Find an interview
Search for previously submitted interviews

Folder Name
Enter Interview Name **SEARCH**

Interviews submitted in the last 24 hours
No Interviews to download

In progress interviews
No Interviews in progress

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

Interview Details

Informant First or Given Name **a**

Informant Last or Family Name **a**

Informant RIN **b**

Folder Name **c**

Interview Location **d**

Interview Date **e**

Total Names **f**

- 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.

① Relation	Sex	① First Name	① Last Name	① Birth Date/Year	① Birth Place	Living?
1		First Name b	Last Name b	Birth Date / Year c	Village, District, Region, Country d	e
2	a	First Name	Last Name	Birth Date / Year	Village, District, Region, Country	

- 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."


Is this interview ready for review?
×

Before uploading, please ensure the data entered matches what is on the paper collection form.

CANCEL
UPLOAD FOR REVIEW



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



Success!

Interview uploaded for review

Once this interview has been reviewed and approved, it will be visible on your dashboard.

GO BACK TO MY DASHBOARD



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.

In progress interviews		
Name	Status	
TZ11_005_20230606_1257	Rework Needed	 
TZ11_411_20240215_0930	Rework Needed	 
TZ11_007_20240725_1444	Rework Needed	 
TZ11_9999_20240726_0545	Rework Needed	 
TZ11_9999_20240725_1328	Rework Needed	 
TZ11_007_20240725_1032	Rework Needed	 
TZ11_003_20230615_1055	Rework Needed	 
TZ11_007_20240717_0933	Not Uploaded	 
TZ11_002_20230615_0912	Awaiting Review	
SHOW LESS		

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.

Rework Notes

☐ *Manager Note for Rework*

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.

Interviews submitted in the last 24 hours	
Name	Time Submitted
TZ11_002_20230615_0912	Aug 14, 08:40 AM

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 entire interview folder name into the field and clicking on the “Search” button.

Find an interview Search for previously submitted interviews		Folder Name TZ11_002_20230615_0912 	 SEARCH
Name	Data Entry	Date Submitted	
TZ11_002_20230615_0912	cis.user.M7FR-DYLC	Aug 14, 08:40 AM	

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:

DASHBOARD  INTERVIEWS



Enter data for a new interview

[START INTERVIEW](#)



Find an interview

Search for previously submitted interviews

[SEARCH](#)

Interviews submitted in the last 24 hours

No Interviews to download

In progress interviews

Name	Status	
MG03_222_2222222_3333	Rework Needed	 
MG03_005_20240827_0930	Awaiting Review	

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”

DASHBOARD  INTERVIEWS

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

 [SIGN OUT](#) [DAPHNEE](#)

DASHBOARD  [MANAGE USERS](#)

[Needs Review](#) [Incomplete](#) [Approved](#)

Interviews Needing Review

Results (1)

[SEARCH](#)

Interview Name	Uploaded By	Upload Date	
TZ11_9999_20240726_0545	M7FR-DYLC	Aug 29, 10:52 AM	REVIEW INTERVIEW

Filter Results

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.

Interviews Needing Review

Results (1)

[SEARCH](#)

Interview Name	Uploaded By	Upload Date	
TZ11_005_20230606_1257	cis.user.M7FR-DYLC	Aug 21, 07:26 AM	REVIEW INTERVIEW



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

DASHBOARD DELETE SAVE APPROVE NEEDS REWORK

Interview Details

Informant First or Given Name: Informant Last or Family Name: Informant ID#: Folder Name:

Interview Location: Interview Date: Total Names:

Rework Notes

Enter notes here for errors found on this page. < Page 1 of 11 >

Relation	Sex	First Name	Last Name	Birth Date/Year	Birth Place	Living?
1	Male	Lengare	Martini	1924	Monduli, Monduli, Arusha, Tanzania	No
				Death Date/Year: 1999	Death Place:	
2	Female	Nasiriani	Last Name	1926	Monduli, Monduli, Arusha, Tanzania	No

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:

Success!

This interview is approved

This interview can now be viewed from the approved tab on the interviews screen.

[GO BACK TO INTERVIEWS SCREEN](#)

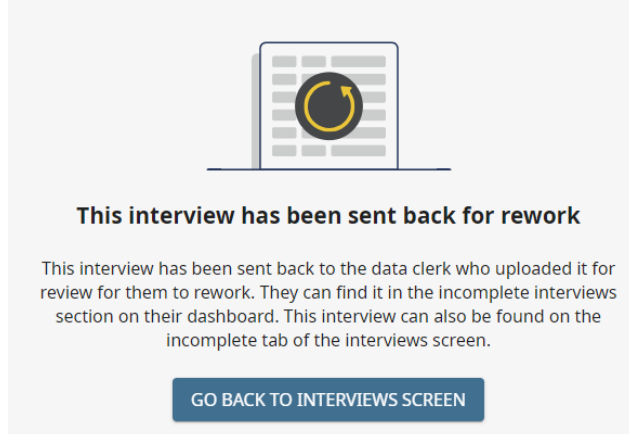
11. If the transcription needs to be reworked, write the needed correction in the “Rework Notes” section underneath the interview header. Then click on the “NEEDS REWORK” button on the top of the page. You will then see the following dialogue box appear asking you to verify your decision to require rework:

Send back for rework? ×

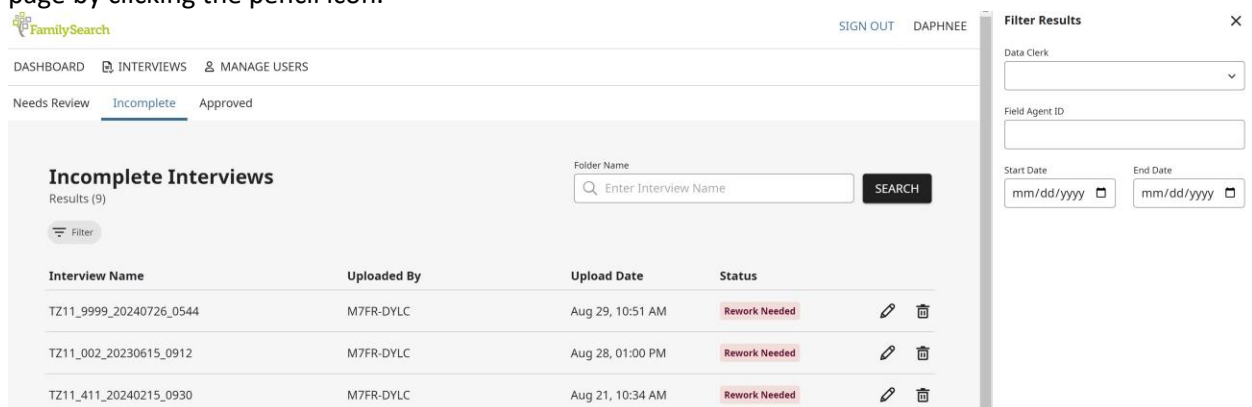
Clicking 'Needs Rework' will send this interview back to data entry to be reworked.

[CANCEL](#) [NEEDS REWORK](#)

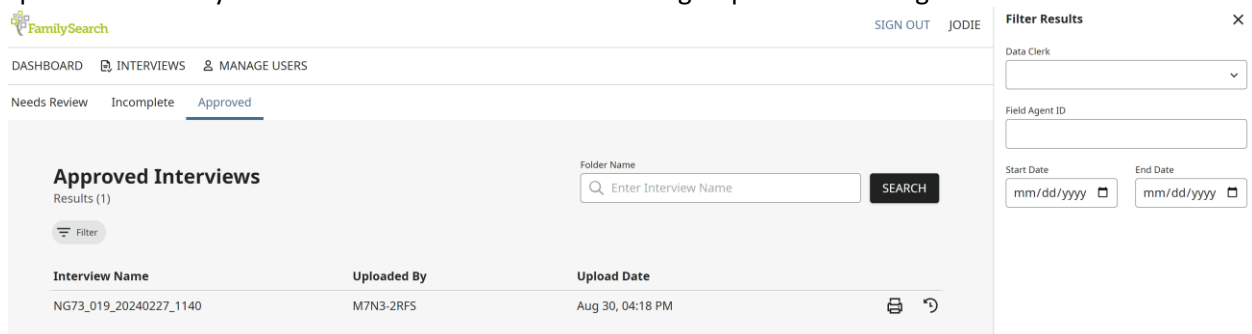
12. If you confirm that this interview needs rework by the data entry clerk, you will see the following confirmation screen.



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.”**

 Add a new data entry clerk 

Enter the new data entry clerk's full name, FamilySearch username to grant the manager access to the pedigree tool.

Full Name

Enter Full Name **a**

FamilySearch Username

Enter FamilySearch username **b**

 New data entry clerks must have previously created an account with FamilySearch before they can be added.


CANCEL

ADD NEW DATA ENTRY CLERK

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.

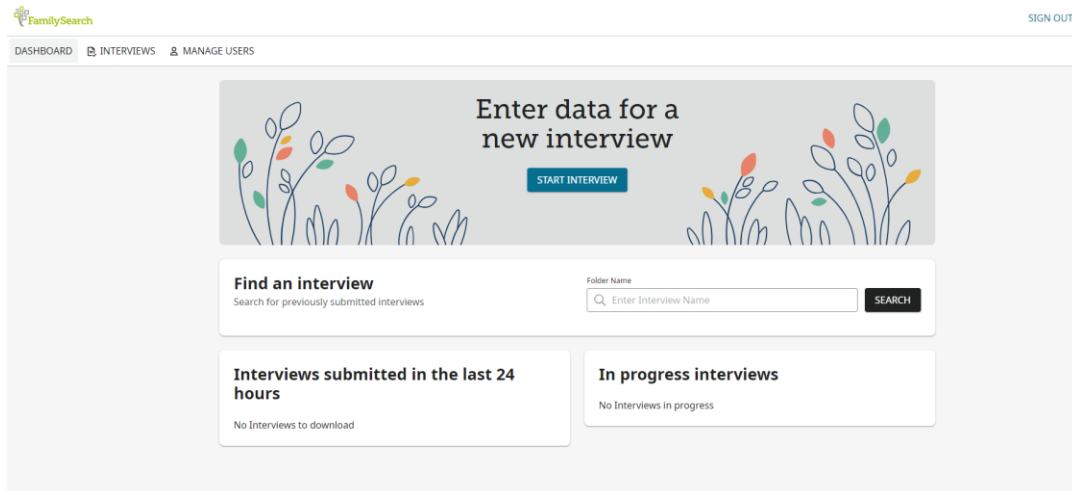
ADD NEW QA MANAGER

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.

