Handout 2: Fold3 Help Center Instructions

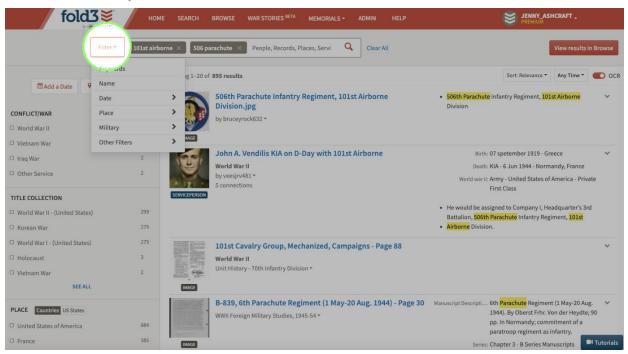
April 24, 2024 Edgewood Family Search Center

Search

The Fold3® search engine lets you search all our record collections quickly and efficiently. Begin by entering a keyword on the home page. You'll notice that as you type in your search term, you can select a keyword, name, or place. This filter will help refine your results quickly. You may also see additional hints to guide you in narrowing your search.

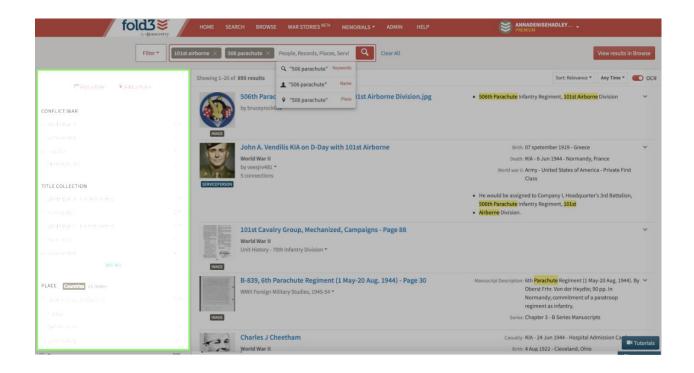
You can further narrow your search results in three ways.

- 1. Add additional search terms in the search bar. For example, you can enter a date or location alongside your original search term.
- 2. Select the Filter tab next to the search bar. This calls up a drop-down that allows you to select additional filters like a military service number.



3. A third option is to select from filters along the left side of the page. You'll see options like conflict, title collection, place, and more.

Once you've located your desired record, you can save it, share it, download it, annotate it, or add it to a Fold3® Memorial. You can also organize your records using Fold3® custom tags.



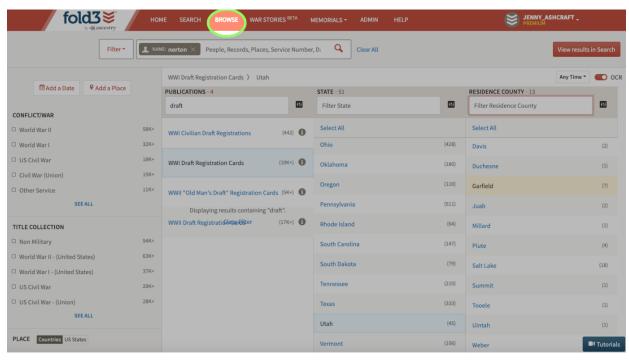
Browse

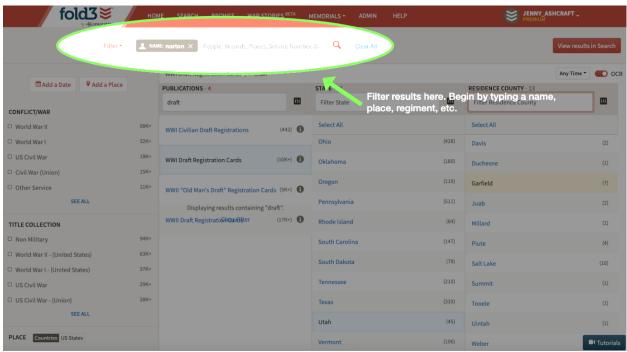
Fold3® Browse is an exciting and patent-pending search experience that allows you to browse through our record collections (we call them publications) in a desired research area. For example, suppose your ancestor served in a specific regiment. In that case, you could browse all records related to that regiment and even drill down to a specific battle the regiment fought in.

Video: Fold3 Browse (2:10) https://youtu.be/95LNRVcadIw

How does it work?

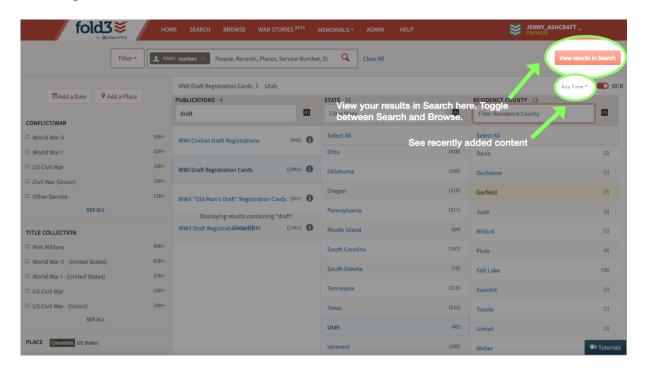
To browse, click on "Browse" in the top menu bar, then start entering search criteria in the search bar to filter and narrow the results.



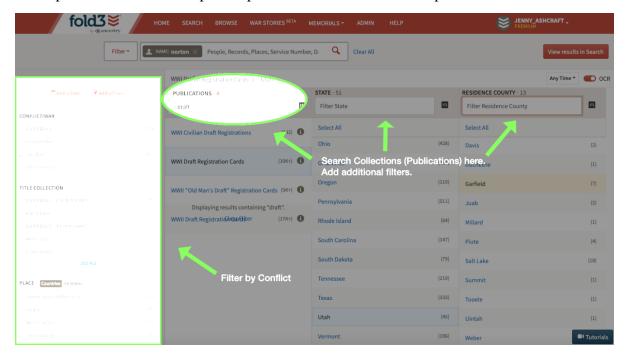


Browse contains features that allow you to:

- Explore individual record collections in depth.
- Filter to see recently added content.
- Alternate between View results in Browse/View results in Search to explore records where your ancestor's name may appear in a record rather than their own (such as vouching for another soldier in his pension record).



- Find ancestors that may have served in the same regiment.
- Explore collections in a specific place or records related to a specific battle.



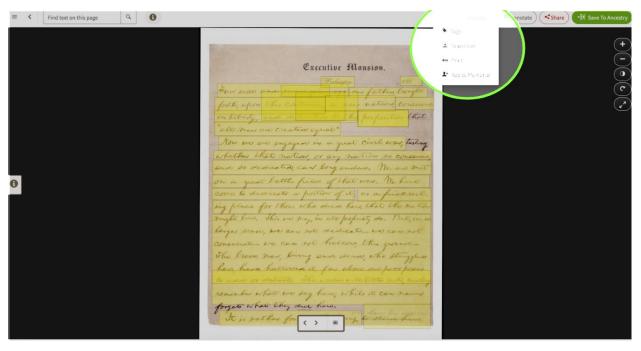
Viewing Documents

Fold3® has a powerful Viewer that allows you to explore records closely and in detail. Built-in tools allow you to Tag, download, print, and add records to Fold3® Memorials. You can also annotate records, share, and save records to Ancestry®. Here are some of the Viewer's key features:



How to Tag

- · Click on the "Actions" tab and select "Tag."
- · Add a new Tag or select from existing Tags.



How to Download

- · Click on the "Actions" tab and select "download."
- · Select either a portion of the page or the entire page.
- · Select desired format (JPEG or PDF)

How to Print

- · Click on the "Actions" tab and select "print."
- · Select either a portion of the page (by adjusting the text box's perimeters) or the entire page.
- · Select "Continue" and Print.

How to Add to a Fold3 Memorial

- · Click on the "Actions" tab and select "Add to Memorial."
- · Choose from Recently Viewed Memorials, Bookmarked Memorials, or My Pages Memorials.
- · Choose which Memorial to attach the record to.
- · The image is now attached to that Memorial. If you would like to detach the record, click on Delete.

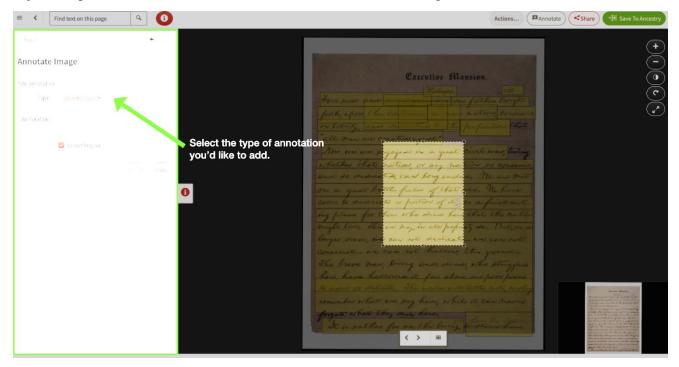
How To Annotate Fold3® Records

Video: Fold3 Viewer and Annotations (2:04) https://youtu.be/sxfbUt BNFA

Adding an annotation to any Fold3® document or image allows you to generate a link and share the record with anyone, even if they don't have a Fold3® subscription. The annotations you create are also searchable on the site.

To annotate, click the + Annotate button and select the type of annotation you'd like to create. You can add a Name, Comment, Date, Place, Military, and more. You can also select Transcription. This option is helpful when transcribing manuscripts.

After completing your annotation, drag the text box around the portion of the record you'd like to highlight and adjust the perimeters. You can also choose to select the entire image.



Finally, click Save. Your annotations are now listed under the Contributions window on the left side of the screen and can be edited and shared.

Save to Ancestry® Tree

- Click on the green Save to Ancestry button in the Viewer toolbar.
- · Log into Ancestry® (Note: If you are already logged in, you will skip this step).
- · Select which Tree and Person you wish to save to.
- · Click Save.

Video: Saving a Fold3 Record to Ancestry (0:53) https://www.youtube.com/watch?v=nfGyP8syAww

Fold3® Memorials

Video: Create a Memorial on Fold3 (3:43) https://youtu.be/40eWyLj09SU

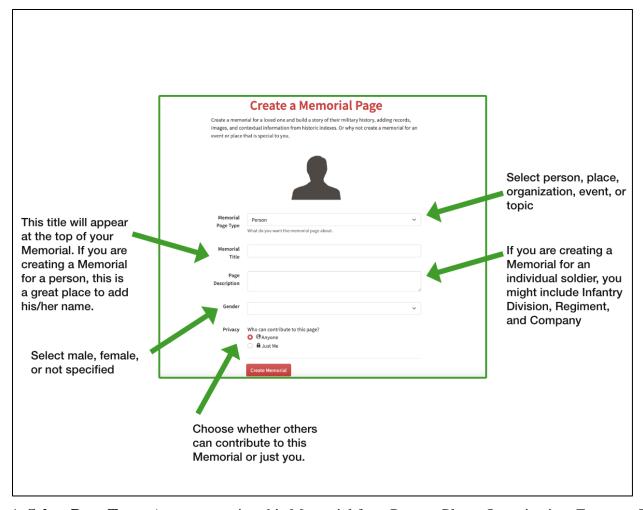
What is a Fold3® Memorial?

A Fold3® Memorial is an excellent way to gather records, photographs, and documents all in one place to honor and remember those who have served. You can create a Memorial for People, Topics, Events, Places, and Organizations. Honor a military hero from your family by creating a Fold3® Memorial. Then, attach all related Fold3® records and photographs and include additional documents you may have at home. Attach stories, memories, journal entries, military decorations, or anything else you choose. Share your Memorial with family members and collaborate with others with ancestors who may have served in the same regiment. Create as many Memorials as you want.

How do I create a Memorial?

Begin by selecting Memorials on the top bar on the Fold3® homepage. You will see a drop-down. Select Create a Memorial.

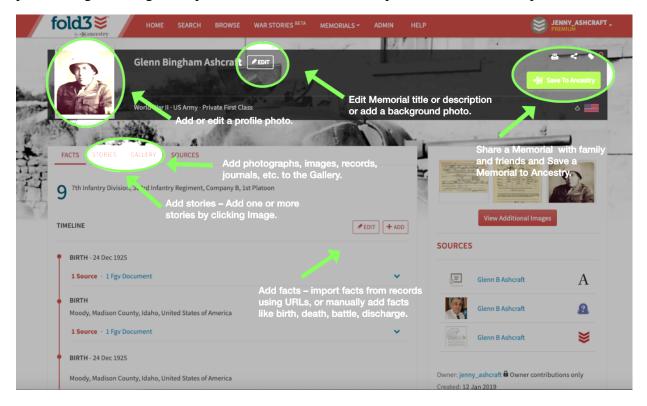




- 1. Select Page Type: Are you creating this Memorial for a Person, Place, Organization, Event, or Topic?
- 2. **Memorial Title**: This title will appear at the top of your Memorial. If you are creating a Memorial for an individual soldier, this is a great place to add his/her name.
- 3. **Page Description**: Add a short description of your Memorial. For example, if you are creating a Memorial for a soldier that served in WWII, you could include their Infantry Division, Regiment, and Company.
- 4. Gender: Select Male, Female, or not specified
- 5. **Privacy**: Choose whether others can contribute information to this Memorial or just you.
- 6. Click "Create Memorial". Congratulations. You have created a Memorial. You can add records, photos, stories, and anything else to create a rich and robust history.

Adding Photos, Facts, and Stories to a Memorial

After you have created a Memorial, Fold3® opens a Page Settings dialog. From here, you can add a profile photo, assign a background photo, edit the title and description, and add stories, photos, and records.

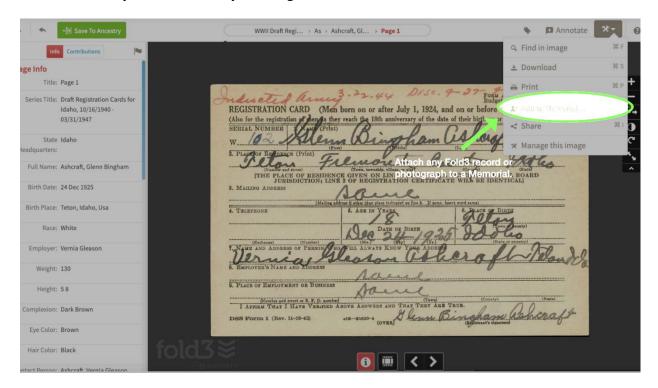


- 1. **Add a Profile Photo**: Add a profile photo by clicking on the silhouette on the top left of your Memorial. You can upload a photo or choose from existing photos.
- 2. **Add Facts**: Facts are only available for person Memorials. You can add important facts like birth, death, and military details. To add a fact, select the +ADD button. You can import facts from records you find on Fold3®, Newspapers.comTM, ArchivesTM, or Find a Grave® by entering a URL. You can also add facts from records or images you recently viewed on Fold3®. If you prefer to add facts manually, select that button and enter the Fact Type, such as birth, death, enlistment, military service, and more. As you add facts, they show up on the Memorial Timeline. You can edit and delete facts by clicking on the fact to expand it, then clicking on the appropriate icon to the right. You may also receive hints from Find a Grave®, Newspapers.comTM, or ArchivesTM.
- 3. **Add Stories**: Stories bring a Memorial to life. You can write one or more stories by clicking on the Stories tab and selecting the +Add A Story button. Give your story a title, then either write a story or copy and paste one. Style icons along the top allow you to add headers, use italics, bold, enter URLs, embed video, and more. The Stories tab is a great place to record memories, transcribe military journals, or share first-hand accounts of military service.
- 4. **Add images to the Gallery**: You can add photographs and images to your Memorial in the Gallery. Select Gallery and click on the +ADD button. From here, you can upload photos and images or select from photos or images recently viewed or bookmarked. To upload an image, either drag and drop it or select one from your computer. You can title the image and select Save. It now appears in your Memorial Gallery.

Attaching Fold3® records to a Memorial

To attach any Fold3® record to a Memorial, look for the tool icon on the top right of the page. Click on the tool icon and select Add to Memorial. For example, suppose your ancestor was in a plane shot down during WWII.

In that case, you could find a report of the incident in our Missing Air Crew Reports, WWII Collection, and then attach it to your Memorial by clicking on the tool icon.



Sharing a Fold3® Memorial

Share your Fold3® Memorial with anyone, even if they are not Fold3® subscribers, by clicking this icon.



Copy the link and share it.

View Your Memorials and Those You've Contributed to

To View Your Memorials, or Your Memorial Contributions, go to Memorials on the top menu bar and select "Your Memorials." From here, you can filter to the Memorials you have created or those you've contributed to. You can also Sort your Memorials alphabetically or by newest or oldest.

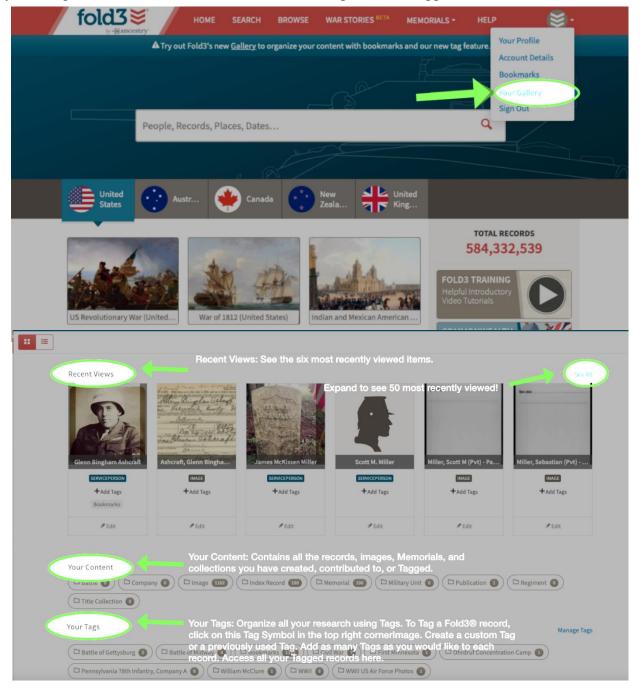
Fold3® Gallery

The Fold3® Gallery and Tags are a great way to organize your research. You can Tag any Fold3® record or Memorial into personalized groupings that are easily accessible and recalled in your Gallery. You need a Basic Membership and must be logged in to Tag a record.

Video: Using the Fold3 Gallery and Tags (2.55) https://youtu.be/V0DqlWW0fSo

Your Gallery

To access your Gallery, click the drop-down box below your name and select "Your Gallery." You will see **Recent Views**, **Your Content**, and **Your Tags** in the Gallery. You can customize your dashboard by displaying your images in a tile format (the default) or the list option in the upper left corner.



Recent Views

As you browse through records and collections, Fold3® keeps track of the items you've recently viewed. You can see the six most recent images in the display. When you select "See All," you can expand this window to include your 50 most recently viewed items.

Your Content

Your Content contains all the records, images, Memorials, and collections you have created, contributed to, or Tagged.

Battle: Tag a Battle page for quick recall.

Company: Tag a Company page for quick recall.

Image: Adding your own images to Fold3 is easy, free, and a great way to preserve and share historical photographs and documents. To upload images, simply follow these steps:

- 1. Go to the Images section in your Gallery and click the Upload button.
- 2. Select one or multiple images from your computer. You can drag and drop the desired image or select the image from your computer.
- 3. PC: Hold down Shift or CTRL while clicking to select multiple files.
- 4. Mac: Hold down the Shift or the Command/Apple key.
- 5. Choose whether you want to upload your images to your Gallery or a specific Collection or Memorial.
- 6. Add an image title and click the Upload Images button.

Once the images are in your Gallery, you can edit their names, add descriptions, and connect them to other images. The more detail you provide, the easier for others to find your contributions. You can filter your images by showing those you have Tagged and those you have contributed.

Fold3 supports. jpg, .gif, .tif, and .png images that are less than 10 megabytes in size.

Indexed Record: See any indexed records you've included in a Memorial or have added corrections or annotations.

Memorial: The Memorials tab will take you to all the Memorials you have created or contributed to. From there, you can search those Memorials for names or specific content. You can also filter your search to Memorials you have created or Memorials you have contributed to.

Military Unit: Tag a military unit for quick recall

Publication: Tag frequently searched Publications for quick access from Your Gallery.

Regiment: Tag frequently searched Regiments for quick access from Your Gallery.

Title Collection: Tag frequently searched collections for quick access from Your Gallery.

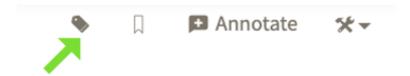
Fold3® Tags

Your Tags

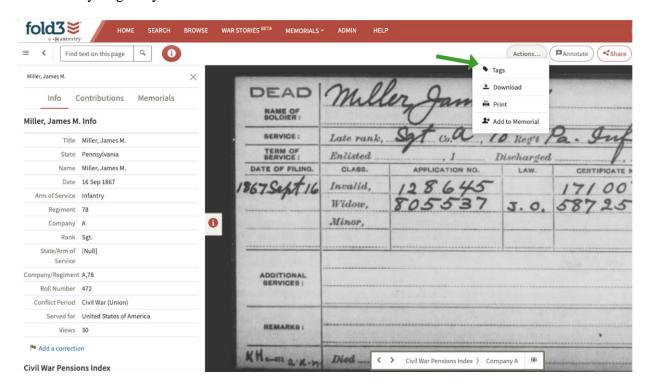
You can organize all of your research and content using Fold3® Tags. Tags allow you to group records that can be easily searched and recalled.

How Do I Add Tags?

Tags can be added from your Gallery, Memorials, or any individual record. Click on the Actions tab and select the Tag icon from the drop-down. You can choose a previously used Tag or add a new custom Tag.



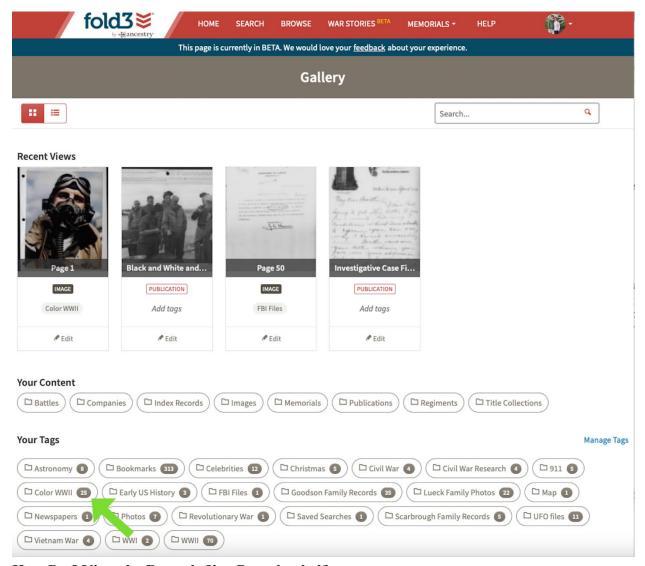
Add as many Tags as you would like to each record.



From Your Gallery, you can edit or delete Tags when you click on "ManageTags." To delete Tags, just click on the garbage can icon. To edit Tags, click on the Tag and make any desired edits.

How Do I View the Records I've Tagged?

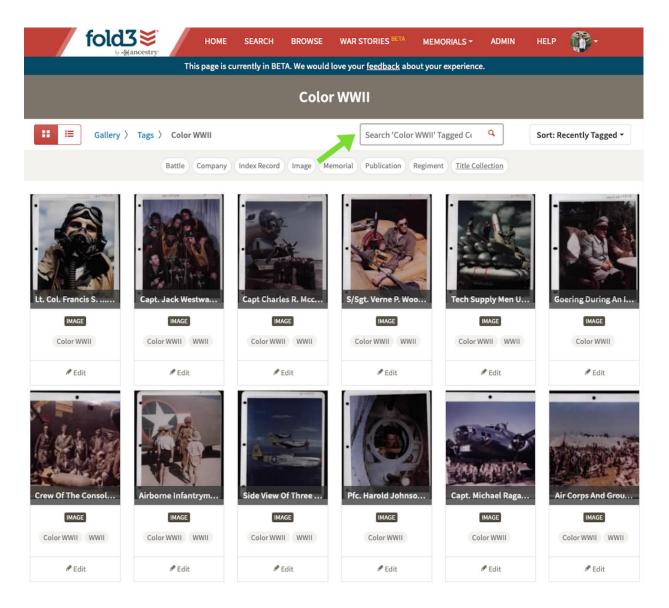
Once you have created Tags, you can quickly access your Tagged records under "Your Tags." Simply click on the desired Tag. In this example, we created a collection and added the Tag "Color WWII."



How Do I View the Records I've Downloaded?

If you downloaded content from the Viewer, the downloads will appear in your gallery at the bottom. Downloads are kept for a few days so you can come back and download your content. The expiration date is displayed on the download for your convenience. As downloads expire, they will be removed from your gallery.

To download content from your gallery, click the 'Download' button at the bottom of the tile. To view the content in the Viewer, click on the image in the tile.



We hope you enjoy using the Fold3® Gallery and Tag features to organize your research and records.

Your Profile

Profile Pages

Each member of Fold3® has a public Profile Page that displays basic personal information and a list of their contributions to the site. Your profile page is accessible by selecting the drop-down menu below your name.

Your Profile

You can update your profile to:

- · Include a photo or image
- · Specify your general location
- · Share your interests in the "About" section

In addition, your Profile Page shows the contributions you have added to Fold3®, including:

- · Annotations and comments
- · Memorials you have created
- · Images you have uploaded

Other Members' Profiles

Profile Pages of other members can be a great way to connect and collaborate. When you see contributions added by another Fold3® member, you will see their photo or image and a member name next to it. Clicking on the Member name will take you to their Profile Page, where you will find a list of their contributions to Fold3®. You will also see the "Contact Me" option if the member has enabled that feature.

Managing Your Account

You can manage all aspects of your account by hovering over your name in the top right corner and selecting "Account Details."

Account Details

Go to your Account Details when you need to:

- · Change your member name, password, or email address.
- · Change your membership settings.
- · Update your billing information.
- · Change your communication settings. To do this, select edit and choose from options in the dropdown menu, including whether other members may contact you.
- · Link your Ancestry® account to your Fold3® account.
- · Link your Facebook account to your Fold3® account.

Contact us

Contact Fold3 Support here.

Frequently Asked Questions

How do I sign up for Fold3®?

Choose a Fold3® plan that is best for you by clicking here.

Forgot my password?

Reset your password here.

How do I renew my membership to Fold3®?

Renew your Fold3 membership <u>here</u>.

How do I upgrade my membership to Fold3®?

Upgrade your membership here.

How do I cancel my membership to Fold3®?

To cancel your subscription, visit Account Details under Membership Type or contact us <u>here</u> before your free trial ends or at least two days before your membership renews to avoid being charged for the next billing cycle.

How do I set up auto-renew or cancel auto-renew?

Adjust settings for your auto-renew here.

How do I create a Memorial for Fold3®?

See instructions and a video tutorial for creating a Memorial here.

I found an existing Memorial for my ancestor, but I would like to make some changes. Why can't I edit the Memorial?

When you create a Fold3® Memorial, you can choose whether others can contribute information or just you. If a Memorial is private, others can't make edits. You can contact the Fold3® member to suggest an edit or create a new Memorial incorporating your changes.

Why Can't I Find More Records For My Soldier?

In 1972, a National Personnel Records Center fire destroyed approximately 16-18 million Official Military Personnel Files. This included 80% of US Army records for personnel discharged from 1912-1960; and 75% of Air Force files for personnel discharged from 1947-1964. Fold3® is a great way to reconstruct a military history despite the loss of those official records.

Why don't you have records from more recent conflicts?

The Privacy Act of 1974 provides protection for military records, and these records are only available to the veteran or next-of-kin from the National Personnel Records Center.

Which Browsers does Fold3® support?

Fold3® supports Chrome, Firefox, Edge, and Safari.

How come I can't annotate or upload any records?

Fold3® needs to verify your email before you can upload records or add annotations. Verify your email address is correct in Account Details, then watch for a message from accounts@fold3.com and click on the link in the message.

Why am I encountering issues with Search?

If you see an error message that occurs repeatedly, please contact us <u>here</u> so we can investigate further. Please provide as many details as possible and tell us what you did when encountering the error.

How do I create a free Basic Fold3® membership to access free collections and create Memorials? From the Fold3® homepage, select 'Join Now' and use your email to register for a free limited membership.

What is the difference between a free Basic Fold3® membership and a Fold3® Premium Paid Membership?

Some of our collections are available to search and browse for free. A free Basic membership allows you to search these collections, annotate, print, and add images to Your Gallery. You can also search and annotate Member images. Anyone with a Basic membership can also create Memorials. All other tools and collections require a Premium Paid membership.

What is the difference between a 7-Day Free Trial and a free Basic Fold3® membership?

A 7-Day Free Trial gives you full access to our premium content and tools for one week, at which point you can cancel your free trial, or it will convert to a Premium membership. A free Basic Fold3® membership allows you to search and browse our free collections. It will not convert to a Premium Paid membership. Learn more here.

Why does Fold3® charge for publicly accessible records?

Some of our records are digitized through a partnership with the National Archives. This partnership allows researchers and the general public to access records from the convenience of their homes and devices rather than traveling to National Archive research rooms, hiring private researchers, or submitting requests and accompanying fees to the Archives. In addition to records from the Archives, Fold3® has an extensive collection of records from other sources not readily available to the public.