Contents

Introduction .............................................................. 1
  Overview and Purpose of Family Record Extraction ................. 1
  Family History and Technology ...................................... 1
  How Indexes Are Created ........................................... 1
  Handbook Distribution and Use of Terms ............................ 2
  Downloading Most Current Version .................................. 2
  How to Get Help ...................................................... 2

Part 1: Organization of Family Record Extraction .................... 3
  Basic Organization of Family Record Extraction .................... 3
  Priesthood Leadership ............................................... 3
    Area Family History Adviser ...................................... 3
    Stake Presidency .................................................. 3
    High Council Adviser ............................................. 4
  How to Set Up Family Record Extraction
  (For Stakes Not Currently Participating) ............................ 4

Part 2: Making the Most of the Call to Serve in Family Record Extraction ............................................. 5
  Stake Extraction Directors ........................................... 5
  Assistant Stake Extraction Directors ................................ 6
  Indexers, Arbitrators, and Verifiers ................................ 7

Part 3: Training ......................................................... 8
  Training for Stake Extraction Directors ............................. 8
  Training for Indexers, Arbitrators, and Verifiers .................... 8

Part 4: Participation .................................................... 10
  Involving Church Members .......................................... 10
  Involving the Community .......................................... 11

Part 5: Value of Indexes ................................................ 12
  Description of the Digital Delivery System .......................... 12
  Using an Index to Simplify the Research Process .................... 12
  Importance of Accuracy ............................................. 12
Part 6: Basic Principles of Family Record Extraction .......... 13
  General Indexing Guidelines ................................... 13
  How to Find Basic Instructions for FamilySearch Indexing .......... 13
  How to Find Basic Instructions for Universal Data Entry .......... 13
  Project-Specific Indexing Guidelines ............................ 14
  How to Find Project-Specific Instructions for FamilySearch Indexing .... 15
  How to Find Project-Specific Instructions for Universal Data Entry .... 15

Part 7: Tools and Quality Assurance ............................... 15
  Overview of Two Indexing Methods ............................... 15
  Differences between FamilySearch Indexing and UDE 6.0 ............ 16
  FamilySearch Indexing Software .................................. 16
  How a New Stake Extraction Director Begins ..................... 16
  Quality Assurance .................................................... 17
  Universal Data Entry Software .................................... 18
  How the Stake Extraction Director Supervises UDE Indexing ........ 18
  Quality Assurance .................................................... 18

Dedication ............................................................... 19
Introduction

Overview and Purpose of Family Record Extraction

Family record extraction is a vital part of the effort to redeem the dead. Over the years the Church has acquired billions of records that contain the names of individuals who have lived on the earth. Although this immense collection of information is a great blessing, it has limited value if researchers cannot quickly and simply locate data for their own ancestors.

• Through family record extraction, workers create automated indexes to various historical documents that contain the names of individuals who have lived on the earth. The indexes are then made accessible worldwide through the Church’s family history Internet resources and computer programs. Names from extracted indexes are also sent to the temples when needed to supplement the names that members provide for ordinance work.

• The published indexes may include direct links to digital images of original documents.

The Church carefully prioritizes which records are most needed in order for members to do their own family history research and perform temple ordinances. These records are then made available to participating stakes to be indexed.

Family History and Technology

Family record extraction has changed a great deal over the years as technology has made it easier to complete this important work. President Howard W. Hunter spoke about the impact that technology has on family history work:

“The Lord has had a hand in bringing forth technology to accelerate family history work. In recent years we have begun using information technology to hasten the sacred work of providing ordinances for the deceased. The role of technology in this work has been accelerated by the Lord himself, who has had a guiding hand in its developments and will continue to do so. However, we stand only on the threshold of what we can do with these tools. I feel that our most enthusiastic projections can capture only a tiny glimpse of how these tools can help us and of the eternal consequences of these efforts” (The Teachings of Howard W. Hunter [1997], 65).

How Indexes Are Created

Indexes are created using one of the following two computer software programs:

• FamilySearch Indexing is the preferred method for all stakes that are beginning family record extraction.

• Universal Data Entry (UDE) 6.0 is the method used by those who continue to index using CD-ROMs, microfilm, or paper.

A detailed description of these software programs and how each is used is given in “Part 7: Tools and Quality Assurance.” Indexed data from either software system is equally valuable.
Handbook Distribution and Use of Terms

This handbook is for the use of area family history advisers; stake priesthood leadership, including the stake presidency and the high council adviser for temple and family history work; and stake extraction directors and assistants.

In this handbook, the term “stake” also refers to “district.” “Stake presidency” also refers to “district presidency.” Mission and district presidencies should follow the instructions in this handbook as far as they are applicable.

Downloading Most Current Version

This document may be subject to change as the software programs are updated. To access the most current edition online, look for the Family Record Extraction Administrative Handbook in either of the following two places:

• From www.familysearchindexing.org, the home page of the FamilySearch Indexing Web site, click the Help tab. Click the Publications tab.

• From www.lds.org, click Serving in the Church. Click Family History. Click FamilySearch Indexing and Family Record Extraction.

Compare any printed copies against the online edition to check for updates. Destroy all outdated printed versions to avoid confusion.

How to Get Help

Help is available to everyone who serves in family record extraction. Indexers should contact their stake extraction director when they have questions or concerns. Stake extraction directors should consult their high council adviser for help with questions pertaining to program objectives, organization, and personnel. For answers to how-to questions about an indexing project, the stake director should first check the written or online instructions that accompany each project. When high councilors or stake directors cannot find an answer or need additional assistance, they can call Church headquarters at 1-866-406-1830 (toll-free) or send an e-mail to indexing@familysearch.org.
Part 1: Organization of Family Record Extraction

Basic Organization of Family Record Extraction

The family record extraction program is one facet of temple and family history work in the Church. It is organized in each participating stake under the direction of the stake presidency and tailored to individual needs and available resources. Refer also to section 9 of the Church Handbook of Instructions, Book 2: Priesthood and Auxiliary Leaders, “Temple and Family History Work” for background information. When a stake chooses to participate in family record extraction, the program will usually be set up in the following way:

- A high council adviser for temple and family history work is assigned to oversee family record extraction.
- A stake family record extraction director is called.
- Assistants may be called to help the stake extraction director as needed.
- Family record extraction workers or indexers may either receive a formal call to serve by the stake presidency or participate as volunteers. Each participating stake should have a core group of indexers who are called and set apart. However, anyone who wants to help with the work is invited to register online and join in the effort, whether a member of the Church or a member of the community. (Note: In the Church Handbook of Instructions referred to above, this role is identified as “family record extraction workers.” In this document, family record extraction workers are called “indexers.” Both terms are correct.)

Priesthood Leadership

Area Family History Adviser

Not all geographic areas of the Church have an area family history adviser. If advisers have been established, priesthood leaders can refer to page 264 in section 9 of the Church Handbook of Instructions for information about their role in family history activities. For example, the area family history adviser might provide leadership training and support as directed or approved by the Presidency of the Seventy or the Area Presidency.

Stake Presidency

The success of family record extraction depends largely on the attention and support given by priesthood leaders. When priesthood leaders talk regularly with stake directors and are aware of their needs, those serving in extraction feel valued and appreciated. Guidance for stake presidency members is provided on pages 266–67 in section 9 of the Church Handbook of Instructions. Other administrative contributions that could promote a successful stake family record extraction program might include the following:
• Allocate a small budget to cover supplies and training costs.
• Consult regularly with the high council adviser to review the progress and needs of the extraction program.
• Encourage bishops to think about members of their ward who might benefit from a formal call to serve.

**High Council Adviser**

The high council adviser may oversee stake family record extraction in the following ways:

• Work closely with the stake presidency to receive direction in resolving issues that need priesthood attention.
• Understand the purpose, organization, and operation of family record extraction.
• Ensure that the extraction effort has the necessary staff and facilities to operate effectively.
• Prayerfully consider who might receive a formal call to serve. (See “Part 4: Participation.”)
• Provide leadership in implementing indexing processes and tools that best meet the needs and circumstances of stake members. (See “Part 7: Tools and Quality Assurance.”)
• Facilitate the calling of a stake extraction director, assistant stake extraction directors as needed, and indexers by making recommendations to priesthood leaders.
• Set apart a stake extraction director, assistant stake extraction directors, and indexers as directed by the stake presidency.
• Supervise and support the stake extraction director.
• Assist in training the staff to use computers and follow indexing instructions. Consider calling a stake computer specialist to help workers with technical questions.
• Instruct workers on the spiritual nature of family record extraction.
• Report regularly to the stake presidency on the status of record extraction and any needs or concerns.

**How to Set Up Family Record Extraction (For Stakes Not Currently Participating)**

Becoming involved is easy. If the stake presidency would like the stake to participate in family record extraction, submit a request through the channels outlined below:

• Stake presidencies in North America submit the request to their assigned contact in the Presidency of the Seventy.
• Stake presidencies in other areas of the world submit the request to their Area President.
If the request is approved, the recommendation is sent by e-mail to Church headquarters, where the stake is set up as an extraction stake.

When determining whether or not the stake should participate, the stake presidency may consult with the area family history adviser and consider the following questions:

1. Are enough members available to devote time to indexing without neglecting other Church callings? Indexers usually spend a minimum of two to four hours per week extracting records.

2. How many stake members have access to a computer and the Internet at home?

3. Can the computers in the family history center be made available for indexing purposes for those who do not have a computer or the Internet at home?

4. Could stake members who are less-active or who may be physically unable to serve in other capacities benefit from serving in family record extraction?

Be aware that since both members and nonmembers can volunteer online to help with the work, volunteer indexers may already be assigned to a stake before it is officially set up and functioning with a stake extraction director who is called and set apart. (For guidance in working with the volunteers, see the fifth bulleted item under “Stake Extraction Directors” in “Part 2: Making the Most of the Call to Serve in Family Record Extraction.”)

The Church will not require stakes or individuals to purchase computers or an Internet connection, nor will the Church provide this equipment.

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Part 2: Making the Most of the Call to Serve in Family Record Extraction

Stake Extraction Directors

The stake presidency or assigned high council adviser calls and sets apart a stake extraction director who coordinates the indexing effort in the stake. The call to serve may be extended to a brother, sister, or married couple. Directors should have good management, communication, interpersonal, and problem-solving skills. A basic working knowledge of computers and the Internet is helpful. Some responsibilities may include the following:

- Consult with priesthood leaders to decide how to best meet the needs of potential indexers. Some might work most productively using FamilySearch Indexing; others Universal Data Entry. (See “Part 7: Tools and Quality Assurance.”) The stake may choose to use one computer software system exclusively or to use a combination of the two.
• Organize all aspects of the family record extraction program within the stake. This could include setting up indexers to participate in FamilySearch Indexing or loading Universal Data Entry software on an indexer’s home computer.

• Recommend to priesthood leaders various stake members who could receive a formal call to participate, such as:
  ◆ Those who have access to a computer, the Internet, and e-mail.
  ◆ Those who may be unable to serve in another Church calling because of physical limitations.

See more suggestions in “Involving Church Members” in “Part 4: Participation.”

• Contact Church headquarters for answers when questions and problems cannot be resolved within the stake. (See “How to Get Help” on page 2.)

• Accept volunteers, whether members or nonmembers, and provide support, fellowship, and training. If you have concerns about individuals who have been added to the stake roster, discuss the matter with the stake presidency and high council adviser over family record extraction. If concerns cannot be resolved within the stake, contact Church headquarters. Volunteers are added to a stake roster according to the following criteria:
  ◆ The volunteer indicated a stake affiliation when registering online.
  ◆ The volunteer didn’t indicate a stake affiliation, but the address appears to be within the stake boundaries.

• Conduct training sessions for assistant directors, indexers, arbitrators, and verifiers (including volunteers) as needed. See suggestions of how this could be done under “Part 3: Training.” (For information about the roles of arbitrators and verifiers, see page 7.)

• Delegate responsibilities to assistant directors as needed.

• Participate in a special indexing project in cooperation with a historical or genealogical society, if asked.

• Under priesthood direction, coordinate computer schedules at the family history center for family record extraction, if necessary.

• For FamilySearch Indexing, update the ward field on the administration user list with the names of new volunteers when you receive an e-mail indicating that a volunteer has been added to the stake group. This will facilitate accurate stake and ward statistical reports.

• Report regularly to the high council adviser on the progress of family record extraction within the stake. E-mail or give printed copies of monthly, quarterly, and annual reports to priesthood leaders to make them aware of the indexing activity level within the stake.

Assistant Stake Extraction Directors

One or more assistant stake extraction directors are called as needed to help the stake extraction director. Tasks that could be delegated to an assistant include the following:
• Supervise a group of indexers who are using FamilySearch Indexing software.
• Supervise a group of indexers who are using UDE software.
• Supervise a group of indexers who index in non-native languages.
• Provide computer expertise.
• Become knowledgeable about specific project instructions, and share that knowledge in regular training sessions.
• Offer assistance wherever needed.

Indexers, Arbitrators, and Verifiers

Indexers perform the actual transcribing, or indexing, of records. Arbitrators check the accuracy of indexes created using FamilySearch Indexing. Verifiers check the accuracy of indexes created using UDE. Arbitrators and verifiers should also continue to index in order to keep informed of potential concerns indexers may have and to keep current with changing rules. Each arbitrator and verifier should index at least one batch for every five batches arbitrated or verified. Workers typically serve between two and four hours per week and may work in their homes, in a meetinghouse, or wherever they have access to a computer and the Internet.

Indexers may participate in one of the following capacities:

• As a member of the stake who has been called and set apart. A member of the stake presidency or an assigned high councilor calls and sets apart members to serve as indexers.

• As a volunteer. Volunteers can sign up online either on the FamilySearch Indexing Web site or on www.lds.org. (On LDS.org, click Serving in the Church, Family History, and FamilySearch Indexing and Family Record Extraction.) Volunteers may be members of the Church or members of another faith. When a volunteer registers and provides the name of his or her stake, the stake is informed, and the volunteer’s registration information is included on the stake’s roster of users. The stake extraction director does not need to set up volunteers who register online. They are enrolled automatically in the program after they submit their registration.

Responsibilities include the following:

• Become very familiar with project-specific instructions before indexing, arbitrating, or verifying each new project.

• Type pertinent family history information from historical documents into a computer software program.

• Learn to read and interpret a variety of records.

• Check the typed information for quality by comparing the computer entries with the documents from which the entries were taken.

• Communicate with the stake extraction director or assistant director(s) for answers to questions.
Part 3: Training

Training for Stake Extraction Directors

Although the high council adviser instructs the stake extraction director regarding the organization and objectives of family record extraction within the stake, the stake director should study and learn the details of the indexing process on his or her own. To do this, the stake director might do the following:

- Study this administrative handbook.
- Attend a training session conducted by the area family history adviser if the opportunity is available.
- Complete the training tutorials that are available on the FamilySearch Indexing Web site at www.familysearchindexing.org.
- Look for additional training opportunities to be posted on the FamilySearch Indexing Web site.
- Read past memorandums and publications on the FamilySearch Indexing Web site.

Training for Indexers, Arbitrators, and Verifiers

By teaching indexers, arbitrators, and verifiers how to correctly perform their tasks, the stake extraction director can bring about many positive results. A few are listed below:

- Workers gain confidence in their own ability.
- Workers learn new skills and feel appreciated.
- A feeling of cooperation, unity, and enthusiasm for family history work develops within the stake.
- Top-quality indexes that will aid in genealogical research are produced.

Teaching techniques that stake extraction directors might adapt for training sessions with indexers, arbitrators, and verifiers are found in two teaching resource books published by the Church. To access these teaching resources, follow these steps:

1. Go to www.lds.org
2. Click Gospel Library.
3. Click Support Materials.
4. Click Teaching Support Materials.
5. Click Teaching Guidebook or Teaching, No Greater Call. Both are excellent resources.

Additional suggestions for training might include the following:
**Orientation Session**

The stake extraction director and high council adviser over family record extraction could conduct an orientation session to help newly called indexers and recently registered volunteers appreciate the importance of the work. The following topics could be included in the presentation:

- An explanation of how indexing helps researchers worldwide more easily locate pertinent information about their ancestors. (See “Part 5: Value of Indexes.”)
- A description of the organization of family record extraction.
- A brief overview of the indexing process.
- An explanation of the need for accuracy.
- A demonstration of how to access the tutorials for FamilySearch Indexing. The tutorials can either be viewed online or downloaded for offline training.
- A demonstration of how to access and use the online software system helps for UDE.
- An explanation of how to find both general and project-specific instructions.
- An explanation of the support model. (See page 2, “How to Get Help.”)

**Detailed Instruction Training Sessions**

As a follow-up, the stake extraction director and high council adviser over family record extraction could conduct one or more training sessions to teach specific procedures that indexers, arbitrators, and verifiers will use to accomplish their tasks. These sessions could cover the following topics:

- How to use computer software programs.
- How to read and index historical documents.
- How to find and follow project-specific indexing instructions. As part of this training, make sure that each worker understands the instructions, how to find them, and how to apply them while indexing the records.

These sessions might be a good time to provide some hands-on experience. The stake extraction director could demonstrate the indexing process and then have the worker index a few records as he or she observes. The director can answer questions and make suggestions as needed.

During these training sessions, the director might also observe that an indexer has acquired the skills and understanding necessary to participate in verification or arbitration. The director may also decide that a worker could benefit from further training.

**Ongoing Training**

Ongoing training can be conducted successfully in groups, with individuals, or even through newsletters. Such training should occur frequently and regularly. In ongoing training, the stake director may do the following:

- Express appreciation for the indexers and encourage them in their efforts.
- Identify areas where mistakes are being made and explain how to correct or avoid them.
• Share reports on the progress of indexing stake-wide.
• Answer questions and share ideas.
• Give indexers an opportunity to share with each other the blessings they experience as they perform this work.

Part 4: Participation

Similar to work in family history centers, both members of the Church and members of the community with interest and the ability to participate in family record extraction should be encouraged to do so.

Involving Church Members

Each participating stake should have a core group of indexers who are called and set apart. Anyone can participate in family record extraction. Experience with family history is not necessary, though familiarity with computers is preferred.

The number of individuals within each stake who receive a formal call to serve will vary according to the desires of the stake presidency. In some stakes relatively few individuals are called and set apart as indexers, while in other stakes there may be many.

When considering who might receive a formal call to serve, stake priesthood leaders should be sensitive to individual interests and needs. While some members may demonstrate great skills and interest and a sincere appreciation for their calling in family record extraction, others may have trouble working with computers or historical documents and therefore might not feel successful in these callings.

The time that individual workers devote to indexing can vary widely. Members who have callings in addition to family record extraction may be asked to spend only a few hours a week. Other members may wish to spend many hours a week indexing, and it can be their primary Church calling.

Individuals in a wide variety of circumstances can find great joy and satisfaction through service in family record extraction. Indexing can be an ideal calling for people with specific language skills or those who may not be able to hold another Church calling due to travel, irregular work schedules, or other reasons. Others who might participate include:

• Entire families working together, as parents teach their children the importance of temple and family history work.
• Homebound or elderly members who can do family record extraction from their homes.
Youth who are working on projects for the Young Womanhood Recognition or the Eagle Scout Award.

Members who are less active and do not feel comfortable accepting other assignments. These individuals may find family record extraction a welcome opportunity to enjoy the blessings of Church service.

Consider the following questions when determining who should receive a formal call to serve:

- Does the individual have access to a computer, preferably at home? Although not a requirement, members with computers will generally be more productive and successful in their calling.
- Will the individual be able to learn new methods and tools as they change over time?

**Involving the Community**

In this context, the community consists of everyone who is interested in finding their family roots. Many people appreciate the Church’s efforts in making genealogical information available to the public and are eager to help in the indexing process. As more and more indexers join the family record extraction workforce, the enthusiasm spreads. Everyone should feel welcome.

Leaders and indexers should be responsive to individuals who show an interest in this work. As appropriate, gospel principles may be shared to help community members understand the Church’s commitment to temple and family history work. A wonderful spirit influences those who serve. They gain stronger testimonies of the Savior and His atoning sacrifice and develop a deeper appreciation of family ties and the importance of accurate record keeping.

The historical documents that are being indexed are made available through cooperative agreements between The Church of Jesus Christ of Latter-day Saints and the custodians of other church or government records.

Contracts are constantly being negotiated with local, state, and regional historical and genealogical societies to make more records accessible to the public.
Part 5: Value of Indexes

Description of the Digital Delivery System

Imagine an information pipeline that runs directly from a repository of historical documents to a personal computer in someone’s home. The pipe is not made of concrete or metal, but of connected computers and technology. Family record extraction is an essential part of the Church’s effort to create this information pipeline. Here is a brief description of how the pipeline works:

• In addition to the millions of records already in the Granite Mountain Records Vault, historical documents are housed in church and government repositories around the world.
• A team at Church headquarters identifies which documents are most needed to help researchers find information about their ancestors.
• If legal permission has not already been obtained, family history employees negotiate for the rights to film and share the documents.
• Microfilmed documents are scanned and reformatted and digital cameras are used to capture genealogical material that was not previously filmed.
• Family record extraction workers create indexes to the digitized documents.
• The searchable indexes are made available through the Internet to users worldwide.

Using an Index to Simplify the Research Process

Without an index, an information search can sometimes prove to be a daunting task. Coupled with powerful technology, an index that identifies useful pieces of information, such as names, dates, and places, can greatly facilitate this effort. For instance, a person may have limited information about an ancestor, such as a surname, an approximate year, and the location where the ancestor may have been born. Once the index to that locality’s records has been created, the person can type in this information and let the computer search for any possible matches. These research capabilities make family history much easier and more accessible for people who are not professional genealogists. Even a person who is not experienced in genealogical research can use an index to navigate through vast record collections to locate members of his or her own family.

Importance of Accuracy

Those who serve in family record extraction are unselfishly making it possible for untold numbers of people to do their own family research. It is very important that indexers take as much care in indexing information for others as they would for their own families. To do this, indexers should follow the guidelines outlined in “Part 6: Basic Principles of Family Record Extraction.”
Part 6: Basic Principles of Family Record Extraction

General Indexing Guidelines

This section provides some basic indexing instructions that apply to both FamilySearch Indexing and Universal Data Entry. Two fundamental principles are described below:

- The transcription of a historical document should reflect the content of the original certificate or register as closely as possible.

- Indexers will type information into certain fields according to standard formats. The record content is not altered; it is merely organized to facilitate research and retrieval of the indexed data. Standard formatting is often applied to the following indexing fields:
  - Gender
  - Event date
  - Event place
  - Age

How to Find Basic Instructions for FamilySearch Indexing

Basic indexing instructions for FamilySearch Indexing are available either online or offline and can be accessed from anywhere within the application by doing the following:

1. Press F1.
2. Click on the topic Basic Indexing Guidelines.

Additional basic instructions that teach how FamilySearch Indexing works and answer common questions are available online in the tutorials. To access these interactive lessons from the FamilySearch Indexing home page, click on the Help tab. Indexers should complete lessons 1, 3, and 4. In addition to these three lessons, stake extraction directors should complete lessons 2 and 5, and arbitrators should complete lesson 5.

Other helpful information can be found by going to the Help menu and clicking on the Publications and FAQ tabs. The documents can be read online or printed and kept for reference.

How to Find Basic Instructions for Universal Data Entry

Instructions for using the UDE software are included in the software and can be accessed by following these steps:

1. On the menu bar, click Help and then Help Contents, or on the toolbar, click the Question Mark icon.
2. Search for an answer using the Contents tab, the Index tab, or the Find tab.
General indexing instructions for UDE are outlined in a printed document titled “Family Record Extraction Guidelines for the INDEX05 Template.” A copy is included with each batch of records that is mailed from Church headquarters to the stake extraction director. (See “Part 7: Tools and Quality Assurance.”)

Also available is a printed trifold document titled “Universal Data Entry (UDE 6.0) Quick Reference” and a CD-ROM that includes a UDE PowerPoint™ training presentation. If necessary, these training tools may be ordered from Church headquarters. See contact information under “How to Get Help” on page 2.

**Project-Specific Indexing Guidelines**

All projects being indexed, whether using FamilySearch Indexing or UDE software, have project-specific instructions. The indexing rules for the particular software may be dictated by several factors. Some of these include:

- Functionality of the software programs.
- Intended use of the index.
- Agreements made with the record owner.

Project-specific instructions are critical to the accuracy and usability of the index. They define what the documents look like, how they are organized, which fields should be indexed, and what the end product will look like. Indexers must become familiar with the project-specific instructions for each project before beginning to index. Do not assume that documents that look similar have the same indexing instructions.

Project-specific instructions for FamilySearch Indexing contain links to images that illustrate the characteristics of records and include specific how-to directions such as:

- How to handle duplicate filming of records.
- What to do with a title or term that is recorded along with a name on a historical document.
- How to extract the correct locality.
- How the information is grouped, such as alphabetically, chronologically, or by locality.
- How the names were generally recorded—for example, if names were written as given name and then surname or vice versa.
- How to handle records that do not include a given name or surname.
How to Find Project-Specific Instructions for FamilySearch Indexing

Project-specific instructions for FamilySearch Indexing can be accessed in many different ways. Two methods are:

1. From the indexing screen, click the Project Information tab in the center of the screen.
2. Click Indexing Project Homepage.
3. Click Read project-specific indexing instructions.

Or
1. On the Web site, click the Projects tab.
2. Select a project from the current projects list.

How to Find Project-Specific Instructions for Universal Data Entry

For UDE project-specific instructions, read and carefully follow the printed guidelines received with each batch from Church headquarters.

Part 7:
Tools and Quality Assurance

Overview of Two Indexing Methods

As mentioned previously, there are currently two different indexing methods and computer software programs being used to do family record extraction. In consultation with stake extraction directors, priesthood leaders determine how to implement the family record extraction program in the stake. Some workers might be most productive using FamilySearch Indexing; others, Universal Data Entry. The stake may choose to use one computer software system exclusively, or they may wish to use a combination of the two. Indexed data from either software system is equally valuable. FamilySearch Indexing is the preferred method for all stakes that are beginning family record extraction. Universal Data Entry 6.0 is the method used by those who continue to index using CD-ROMs, microfilm, or paper. The following chart explains the differences between the two indexing methods:
Differences between FamilySearch Indexing and UDE 6.0

<table>
<thead>
<tr>
<th><strong>FamilySearch Indexing</strong></th>
<th><strong>UDE 6.0</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Indexers download a small group of images from the Internet. The records can usually be indexed in 30–60 minutes.</td>
<td>The stake extraction director orders inventory from Church headquarters. Records to be extracted are mailed to the stake on CD-ROM, microfilm, or paper.</td>
</tr>
<tr>
<td>Batches, templates, field order, highlights, and name and place lookup lists are all set up automatically. The batch is ready to be indexed when it is downloaded by the indexer. No additional work is required by the stake extraction director.</td>
<td>The stake extraction director divides the inventory into batches and packets and sets up templates, field order, highlights, and name and place lookup lists.</td>
</tr>
<tr>
<td>Indexed images can be submitted by the indexer on the Internet as soon as they are completed.</td>
<td>The stake extraction director can spend 20–40 hours a week distributing and picking up work for both extraction and verification processes.</td>
</tr>
<tr>
<td>General and project-specific instructions are available online and can be viewed or printed by each indexer.</td>
<td>One printed copy of the general and project-specific instructions is mailed with the CD-ROM. The stake extraction director may choose to make additional copies for each indexer.</td>
</tr>
<tr>
<td>Indexers check their own work. Arbitrators check batches needing arbitration.</td>
<td>Verifiers check batches needing verification. The stake extraction director performs an audit on the verified extraction.</td>
</tr>
</tbody>
</table>

FamilySearch Indexing Software

FamilySearch Indexing is an Internet-based software system that is free and contains no advertising or links that generate spam or cause computer viruses. To access the software, open an Internet browser and type www.familysearchindexing.org.

How a New Stake Extraction Director Begins

To begin indexing using the FamilySearch Indexing software, the stake extraction director should follow these steps:

1. Call Church headquarters at 1-866-406-1830 (toll-free) or send an e-mail to indexing@familysearch.org. The director is set up on the system and given a user name, a temporary password, and administrative privileges. With these privileges, directors can set up users and access stake reports.
2. Connect to the Internet.

3. Install the FamilySearch Indexing software. You only need to do this once. Before installing the software, be sure to review the recommended computer specifications, which can be accessed from the FamilySearch Indexing home page by finding the heading Install Software and then clicking computer specifications.

4. Change the temporary password. The system prompts the change automatically.

5. Become familiar with the online instructions and tutorials.

6. Download a batch of digitized images.

7. Disconnect from the Internet, if desired. (This is a matter of personal preference and is not required. It is a step to help those who pay for time connected to the Internet.)

8. Index from the images the required information, such as names, dates, and places.

9. Review possible errors identified by the software quality check and make corrections as needed. The system will prompt users to complete this step.

10. Reconnect to the Internet if working offline.

11. Submit the indexed information over the Internet to Church headquarters.

12. Download another batch of images.

13. Download and arbitrate several batches of records. (See Quality Assurance below.)

14. When comfortable with the FamilySearch Indexing software, set up stake users, or contact volunteers to learn who they are and how to support them in their indexing efforts.

15. Provide training and support for indexers, arbitrators, and verifiers. (See pages 8–9 of this handbook.)

Quality Assurance

To ensure the best quality, each record is indexed by two people. One person is the A Key indexer. The other person is the B Key indexer. The information entered from both indexing processes is independently managed by the system.

As information from the records is typed into the fields, the FamilySearch Indexing software flags potential errors in names, dates, and places by marking them with a red wavy underline. The underline does not necessarily mean the typed information is wrong. It simply means the information is not currently included on the supporting lookup lists (a list of common names, places, and other pertinent information that may be found in the documents being indexed) associated with the field. It is there to remind each indexer to double-check what was typed against what is on the document.

When both the A and B Key indexing is finished and submitted, FamilySearch Indexing compares the two versions. When the software detects differences, the batches are sent for arbitration. The A and B Key results are displayed side-by-side on the computer screen, where they are checked by a third person, called an arbitrator.

The arbitrator reviews each field that has been flagged with a discrepancy between the A and B Key indexing and then does one of the following:
• Selects the indexed version that he or she feels is most correct.

• Determines that neither version is correct and enters another interpretation of the image. If the indexed information is incomplete, the arbitrator may return either or both keyed indexes to the system to be indexed again.

The stake extraction director, the indexer, and the arbitrator share responsibility for a quality index. They should each frequently refer to the online project-specific instructions in order to make consistent decisions.

Stakes are not required to have a specific number of users who have arbitration rights. Some stakes may be confident they can enlist a number of qualified people. Other stakes may not have any. Please provide as much quality arbitration as possible without exceeding the skill level of indexers within the stake. Most stakes should contribute to a balanced workflow, with no more than two batches indexed for each batch arbitrated. Please use the online production reports to monitor this balance.

**Universal Data Entry Software**

The Church provides the UDE software on a CD-ROM that may be ordered by contacting Church headquarters. (See page 2 under “How to Get Help” for contact information.)

**How the Stake Extraction Director Supervises UDE Indexing**

The stake extraction director informs Church headquarters by telephone or e-mail that the stake needs records to index. The inventory, most commonly sent as digital images on a CD-ROM, is mailed to the director’s home. If necessary to accommodate the preferences of individual indexers, the records may also be sent on microfilm rolls or as paper copies of microfilmed documents. The director divides the inventory into manageable groups of records and distributes them to participating indexers.

**Quality Assurance**

After the data is indexed, it is reviewed for errors by a verifier, who may be either another indexer or the director. To verify that the typed information is correct, the worker uses Verify Records. The computer covers the fields that require verification with number (#) signs, and the worker types the information a second time. The computer compares both versions. If the characters match, the computer removes the number sign and shows the character. If they do not match, the computer beeps and pauses until the matching character is typed or a correction is made to the original character.

The director performs a final audit to review the overall quality of the indexed material. To do this, the computer randomly selects 78 records from the batch. The director compares the selected records to the original document images to look for errors that might have occurred during indexing. The audit can be done either online or offline.
In an online audit, the computer shows the records on the computer screen where they can be compared to images of the original records on microfilm or CD-ROM. Corrections or changes can be made as the audit is done.

The offline audit allows directors to conduct the audit without using a computer. The director prints the records to be audited, compares the printout to the images of the original records on microfilm or CD-ROM, notes the errors on the printout, and then gets back on to the computer to enter the corrections into the batch.

Whether using the online or offline audit method, all errors should be corrected before the data is submitted. If there are no errors in the sample set, it is safe to assume the records were indexed correctly, and the stake extraction director submits the indexed data by e-mail to Church headquarters.

**Dedication**

This handbook is dedicated to the thousands of workers who have participated in family record extraction since it was introduced by President Spencer W. Kimball at general conference in April 1978. Similar to the Savior's parable of the laborers in the vineyard (see Matthew 20:1–8), some extractors came “early in the morning” as the program was getting started. They transferred the information from paper or microfilm onto printed forms. More laborers came in “about the third hour” and typed the information directly into a computer program. The workforce continues to grow, and the use of technology continues to accelerate just as President Howard W. Hunter prophesied.

The Family and Church History Department is deeply grateful to all who are dedicated to making family record extraction so successful. Some workers have now moved on to the next life, others have served faithfully for years, and some are newcomers. Regardless of experience or position, each participant is laboring to accomplish this great task of sharing family history information and providing temple work for the dead. “And let us not be weary in well doing: for in due season we shall reap, if we faint not” (Galatians 6:9).