

TempleReady for Windows - Class Instructions

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Each class will consist of a lecture using a LCD projector to illustrate how to use TempleReady for Windows (abbreviated TRWIN for this class). During the following week the student will be expected to complete a class exercise that will reinforce the concepts learned in class

Prerequisites: It is expected that you are familiar with PAF since TRWIN works closely with PAF. We will use PAF Version 5 in class and in the class exercises but TRWIN was designed to work with PAF Versions 3, 4, or 5. Bring this handout with you to each class.

Handouts: This handout contains the class exercises and class illustrations. In addition to this class handout, there are notes on each lecture and additional information contained in a file on your class disk called Notes.zip. This file will need to be restored to your PC. Select the week you want to see and click on the notes icon to view the information for any of the three weeks of the class. Use it to refresh yourself with the topics covered in class.

Class exercises: You will be given a diskette containing the files you will use to complete the class exercises. Use this class diskette at home to practice with during the week. The class diskette will be yours to keep following the class. The class diskette contains four PAF files: two duplicate files called TRData and TRNew, a file called Class5, and the Notes file.

Always use the TRData file for the class exercises. If at any point you want to start the class exercises over again, it will be necessary to restore the TRData file back to its original form. For example, at the end of the class you want to redo the class exercises. You will need to follow this procedure carefully:

1. Restore the TRNew file (Click FILE, RESTORE, click on TRNew, and Restore)
2. Now backup TRNew to your class disk by doing this:
 - a) Click FILE and then click BACKUP
 - b) On the "Back up File To..." dialog screen click on the filename TRData. (Be sure you click on TRData - not TRNew !!)
 - c) Click on BACKUP and then YES to replace the data.
3. Restore the TRData file from your class diskette (Click FILE, then RESTORE, click on TRData, click on RESTORE and then click YES to replace). TRData has now been restored to its original form. You can re-execute the class exercises as many times as you want as long as you follow the above three instructions.

TempleReady Class Agenda

Week 1:

- 1- Overview of the TempleReady for Windows program
- 2- Requirements for using TempleReady for Windows
- 3- Identifying Ancestors who need ordinance work
- 4- The process of preparing names for the temple
- 5- Instructions for running the Update Function of TRWIN
- 6- Suggestions and helps to make the Update run smoothly
- 7- The recommended process from beginning to end - Using TRWIN
- 8- Class Exercises #1

Week 2:

- 1- Why ordinances get duplicated on the Ordinance Index
- 2- How to avoid duplicating ordinances
- 3- How to use the new Search Ordinance Index function of TRWIN
- 4- Displaying your PAF file side by side with the Ordinance Index
- 5- Suggestions how to use the Ordinance Index as a research tool.
- 6- Class Exercise #2

Week 3:

- 1- Temple Policies and Guidelines
- 2- Filtering your file to find names that need ordinances
- 3- Instructions for running the Submit function of TRWIN
- 4- Suggestions and helps for running the Submit function
- 5- When to use a GEDCOM file vs a PAF file when running TRWIN
- 6- Class Exercise #3

TempleReady for Windows - Class Exercises

EXERCISE #1 - TempleReady Update Function

NOTE - Most of the class exercises will have to be done in a Family History Center, the Family History Library, or the Joseph Smith Memorial Building on a PC that runs the TempleReady program. Parts of some exercises can be done on a PC at home. For example, the Notes file can be restored and read on any PC. The procedure to restore the original data files can also be done at home.

STEPS:

- 1) Select a PC that has both the TempleReady for Windows (TRWIN) and the PAF5 Programs installed. Start the PAF5 program.
- 2) Restore the Notes file, the Class5 file and then the TRData file from your class diskette. Do this for each of the three files: Click FILE then RESTORE, and then click on the filename and then RESTORE. This places the files on the hard drive of this PC during the time you do this exercise.
- 3) Make sure that TRData is the active file showing on your screen. Now write down the location of the TRData file as shown in the Title Bar at the top of the screen. Use the TempleReady Export function to find how many names need one or more ordinances in the TRData file (Use a field filter to search the file). Once you know the answer, cancel the function.
 - a. Use TR export function to determine how many names (2) need ordinances.
- 4) Now close the PAF5 program and then open the TRWIN program by clicking on the TempleReady ICON on the desktop screen. Click on the UPDATE MY RECORDS button to start TRWIN. The first time you run TRWIN it probably won't know where the file is located. So, click on the BROWSE button on the SELECT A FILE screen. On the OPEN dialog there will be a drop down arrow. Click on this arrow to get a display of the system. Now use the location of the file that you wrote down to find the file. First click on the drive letter and then double click on the folders until you see the TRData file. Click on TRData and then OPEN.
- 5) Under the HELP function on the right side click on STEP BY STEP INSTRUCTIONS and read all of the information under this topic.
- 6) Since there are less than 50 names in TRData we will select all of the names to be processed by TRWIN (See Step # 12 for the process to follow when you have a large

file that you want to use with TRWIN). Click on the edit menu at the top and then click on SELECT ALL.

- 7) We are now ready to have TRWIN process the names. First review the number of families, individuals, and ordinances selected on the bottom of the screen. Now click on the NEXT button at the bottom.
- 8) You may be prompted to insert two CD's (unless your PC has the ordinance Index files on a server). Follow the instructions. TRWIN will now begin to present to you possible matches to your records from names found on the Ordinance Index. Click on your response at the bottom.

There will be 10 names that TRWIN finds one or more matches for your records. For each match observe the number of records it found as indicated in the upper right. Experiment using the forward and backward arrows to see the different possible matches. As you respond watch how the ordinance dates are brought across to your record. Notice how TRWIN will continue to present different matches until all the dates are filled that it can find. Print one of the matches using the PRINT button.

- 9) Review the Update Report when it finishes and then click DONE.
- 10) Close the TRWIN program and open the PAF5 program. Click on FILE and then on the TRData file. Review the records you have updated: Click on the FIND ICON and then click the ADVANCED button. Click on the DEFINE button and then scroll down part way to double click on LAST CHANGED DATE. Click on the DATE box and enter today's date. Click OK and then click OK. Note how many were updated. Click on the SHOW RESULTS box. Click on one of the names and then click the EDIT button to see the detail. The Last Changed Date on the bottom right should be today's date. Observe the updated ordinances. Find where these dates came from by clicking on one of the *S (source of information).

With your records updated you will want to take a backup copy before you leave. Click the cancel button to get back to the Family View. Now Click FILE and then BACKUP. Make sure your backup is going to the A: drive with your class diskette. Then click the BACKUP button to complete it.

- 11) Close the PAF5 program and open TRWIN again. On the TRWIN main menu select the Update function again. This time click the BROWSE button and find the Class5 file (you restored earlier) using the same procedure you used in step 4.
- 12) The Class5 file has over 2000 records in it, so you don't want to run the Update function against the entire file. It is recommended that you update a large file in batches of about 400 names at a time. Follow this procedure. Click on the EDIT

Menu and then click on SELECT CURRENT RECORDS. This will select all the names on the current screen (the first 20 families).

Now scroll to the bottom of the 20 families and click on VIEW NEXT 20 FAMILIES. With the next 20 families displayed, click on the EDIT Menu again and select the next 20 families by clicking on SELECT CURRENT RECORDS again. Notice that the number of individuals, families, and ordinances are incremented.

Continue this same process until the number of individuals selected is just over 400. Now before you submit these names to the update function click on VIEW NEXT 20 FAMILIES one more time. Write down the name and number of the next individual to be selected. We will NOT do the actual updating of the Class5 file in this exercise as it would take too long.

If you were updating your entire file you should follow this procedure: You would finish this first batch of names, go back to the Update function and select the file again. Click on the FIND FAMILY box and enter the name you wrote so TRWIN will go to the next name in the file. Now select the next 400 individuals to process. Repeat this same procedure until you have done the entire file. Be sure to do a backup of your updated records.

- 13) It's highly recommended that if you want to do the Update function on a large file that you run it on a PC that has the Ordinance Index on a file server. If your Family History Center does not have this capability it is recommended that you go to the Family History Library or the Family Search Center at the Joseph Smith Memorial Building.
- 14) Close TRWIN and Start PAF5. Open the Notes file and read the notes for the lecture given for the First Week.

TempleReady for Windows - Class Exercises

EXERCISE #2 - Search Ordinance Index Function

NOTE: Steps 1 - 5 would be performed easier at home but can be performed on any PC with PAF5. Beyond Step 5 requires the use of the TempleReady for Windows Program (TRWIN).

STEPS:

- 1) Restore the TRData and Notes files from your class diskette like you did in Exercise #1. The TRData file will contain the dates found in Exercise #1. (Can be completed at home)
- 2) In Exercise #1 the TRWIN Update function found all of the ordinance dates that it could. However, some of the names, even though the ordinances have been done, were not found by TRWIN. So, it is necessary for us to search the Ordinance Index ourselves before submitting names to the temple. To do this we will need a report of those names that lack one or more ordinances. (Can be completed at home)
- 3) If you haven't previously defined a custom report to print those individuals needing ordinances, use the Custom Report instructions from the PAF lesson to define the SEARCH ORDINANCE INDEX report. Be sure to save this report. You can also use the Lists report in PAF and print the LDS incomplete individual ordinances.
- 4) Click on the PRINT REPORTS ICON and then click on the CUSTOM tab. Click on the OPEN button and select the report you defined in step 3. With the Search Ordinance Index report defined, click on the SELECT button which will take you to the Advanced Search screen to select the individuals you want printed. Click on the DEFINE filter button and scroll to the bottom of the fields. Select QUALIFIED FOR BAPTISM / ENDOWMENT. Then click on the OR button and then select QUALIFIED FOR SEAL TO PARENT. Then click on the OR button again and then select QUALIFIED FOR SEAL TO SPOUSE. With the filter defined now click OK to search the file. You should have 11 names found. Click OK again to return to the Custom Print Screen. Click on the PREVIEW button to review the report. If the preview looks good, print the hardcopy report.

- 5) The names listed on the report are those that TempleReady did not find on the Ordinance Index and hence are names that it would approve if processed through the Submit function. But since TempleReady does not find all of the names that can be found in the Ordinance Index we need to search the Ordinance Index ourselves for the names it would approve. By doing this we save much time and avoid duplication. In reality, only 6 of the 11 names need ordinance work to be done. Normally, you would search the Ordinance Index for all 11 names to find the 5 that have dates. But to reduce the exercise time, you will only need to search for those names that exist on the Ordinance Index.
- 6) Search the Ordinance Index for the following names: Jens Christensen, Kirsten Laursen, Ane Mogensdatter, Karen Nielsen, and Ane Eleonare Pedersen. Use the information on your hardcopy report to locate them on the Ordinance Index. Remember to search for the names using both the Main file and the Addendum file. Once you find them, write down the ordinance dates on the hardcopy report. (Split Screen)
- 6) Now start PAF5 and open the TRData file. Use the RIN number on the right side of your report to find the right name on the file and then enter the dates and temple codes you found on the Ordinance Index.
- 7) Backup your updated file to your class diskette. The TRData file is now ready to be processed by the Submit function of TRWIN (Exercise #3).
- 8) Open the Notes file and read the lecture notes for Week #2

TempleReady for Windows - Class Exercises

EXERCISE #3 - TempleReady Submit Function

STEPS:

- 1) Restore the Notes file and then the TRData file from your class diskette. The TRData file will contain the updated information from Exercises 1 & 2.
- 2) With the TRData file open, Click on the Tools menu and then click TEMPLEREADY. To run the Submit function, the PAF5 file doesn't have to be closed and TRWIN doesn't have to be told where to find the file.
- 3) Once the file is displayed, click on "Which Names should I choose or not choose?" under the HELP column and read the information provided there. Then click on "Temple Policies and Guidelines." Assume an ancestor was lost at sea and is missing. Type in "missing" and find the rule for doing the temple work for this ancestor.
- 4) Because our TRData file has less than 50 records we can submit all the records at one time. Click on the box for each family. Note the number of Individuals and families selected. Now click on the Individuals tab. Were all the individuals selected ? Why not ? Click on the individual boxes. How many are now selected ? Now click the NEXT box.
- 5) The red messages indicate incomplete or missing information. Some need to be satisfied to do an ordinance others are warnings (assumptions about the data). Look at the messages for Ingeborg Christensen and click on one of them. A birth date is missing and is needed to do her work. Click on her father's record to find his birth date. Go back to Ingeborg's record and enter an estimated birth date of her father's birth year plus 20. Watch what happens to the red message when you save the date.
- 6) Look at and click on the error message for Anna Margrethe Mogensen. What is wrong with the birthplace ? Insert the missing comma. Since Anna was born before her younger sister, Karen, key in the same birthplace for Karen but preceded with the word "of".
- 7) For now, ignore the other error and warning messages. Most of them relate to missing information which you would have to find and enter before the ordinances could be done. We are ready to submit the names to TRWIN, so click on NEXT. You will get some possible matches that we didn't see before. Why ? Tell TRWIN you want to update the records.
- 8) Review the Submission Report that is produced. Don't print the report (although normally, you probably would). Note that the ordinance dates found for Anna &

Karen Mogensen and Ingeborg Christensen are given in the report. These will automatically be updated in the TRData file. Click on NEXT to save the Submission file.

- 9) Note that you will be asked for a diskette for the Submission File and optionally one for a backup file. Also note that you can click on the box to put "Word Submitted in each ordinance date" of those records being submitted.
- 10) Place the Submission File on the Class diskette and the backup file (if you selected it) on the Class diskette. Please be careful not to accidentally submit these names to the temple! Click DONE and close TRWIN.
- 11) Return to PAF5 and open the TRData file. Find the Mogensen children and see if their birth places were updated as well as their ordinance dates.
- 12) Open the Notes file and read the lecture notes from Week #3
- 13) Congratulations, you have finished the class ! If you would like to do the exercises over again, you will need to restore the TRData file back to its original form. Follow the instructions given in the class instructions on page 1.