

## Introduction

The Online Film Ordering User's Guide is designed to help Family History Center Directors understand the procedures and guidelines for using the site.

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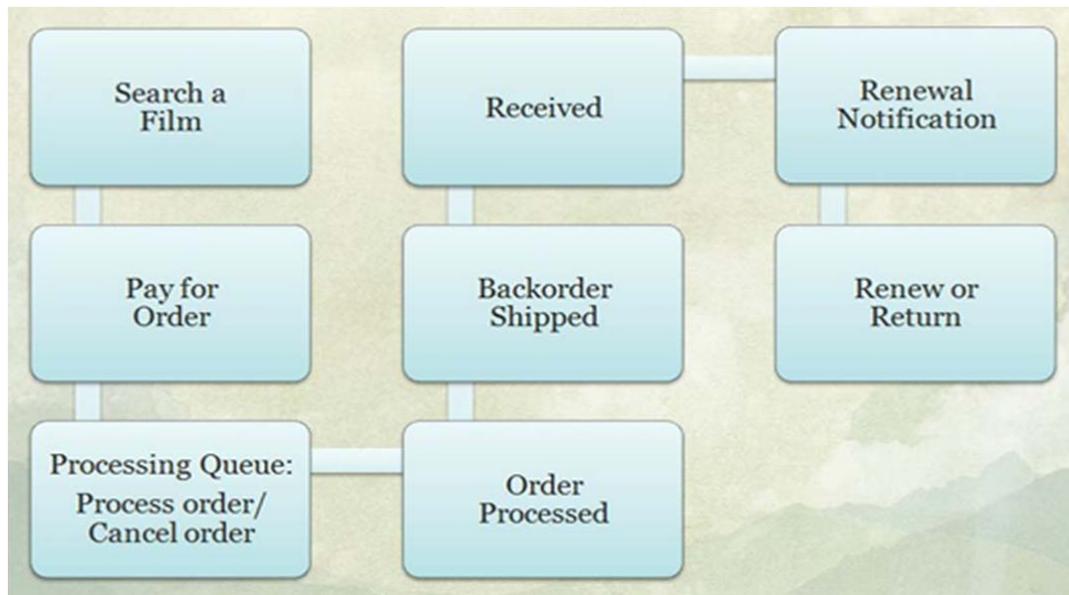
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### Life Cycle of an Order

By logging into the system, directors can search, see history statuses, and see contact information on a particular order. They will also be able to see whether an item has been received, returned, or backordered. To access the Administration Panel for Online Film Ordering, go to <https://familysearch.org/films/admin>.

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The life cycle of an order begins by searching for a microfilm or microfiche to order. Then you add the film to your cart and complete the checkout process to pay for the film. Once the order has been placed, the order is put in a processing queue. This queue gives the patron 24 hours to cancel the order in case he or she accidentally ordered the wrong film or decided the film was no longer needed. After 24 hours, the order is processed. If the film is available, it will be shipped to the selected family history center and the patron will receive an e-mail notifying them of the shipment. If the loan is short-term, the date shipped will mark the beginning of the 90 day loan period.

If the film is not immediately available, it will be placed on backorder and the patron will receive an e-mail notification. Once the microfilm has been received at the family history center, the patron will be notified by e-mail that the film has arrived and is ready for viewing. Seven days before the film needs to be returned, the patron will be sent a renewal notification. At that time, the patron can either renew the film for an additional 60 days or have the film returned.

### Director Authentication

A special administrative section exists for a center director to be able to manage his/her film inventory and patrons. You can access the admin section by going to <http://familysearch.org/films/admin>. Your username is your LDS Mail e-mail address in a unique format. For example, if your email address is `ab_banff@ldsmail.net`, then your username will be `ab_banff_ldsmailnet`. You replace "@" with "\_" and remove the ".".

If you forget your password, click "Forgot Password" and enter your e-mail address. An e-mail will be sent to you with your new password.

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### Film Status Definitions

**Some information is not available on microfilm and microfiche.** Due to contractual agreements with the copyright holders, some records on microfilm or microfiche may not circulate to family history centers. The Family History Library Catalog should indicate that there is no circulation to a family history center. Please check the catalog carefully before placing your order.

#### Definition of Loan Types:

- **Extended Microfiche Loan**—No return date is specified. All microfiche orders are extended loans.
- **Short-term Microfilm Loan**—90 day loan. These 90 days include a 60-day loan period with an additional 30 days to allow for shipping. Some areas will receive the film much sooner than 30 days and will have the additional time to view the film. FamilySearch guarantees the film will be at the Center for at least 60 days up to 90 days. The 90 days begin once the film is marked as "shipped". The film will be returned once the 90 day loan period has expired.
- **Extended Microfilm Loan**—No return date specified. The following exceptions can cause the film to be returned or will not allow the film to be ordered:
  - The Director determines the film is no longer being used.
  - The microfilm has become restricted and is no longer available for viewing.
  - The film already exists in the patron's default family history center.
- **Short-term Microfilm Loan Renewal**—Renews an existing loan from a center or library. The purchase of this loan will renew the loan for an additional 60 days, upon completion of the original 90 days.
- **Extended Microfilm Loan Renewal**—Converts a short-term loan to an extended loan, with no return date specified. The following exceptions can cause the film to be returned or will not allow the film to be ordered:
  - The Director determines the film is no longer being used.
  - The microfilm has become restricted and is no longer available for viewing.
  - The film already exists in the patron's default family history center.

### Statuses on an entire order:

- **Pending.** Your order has not been completed due to a lack of payment information or funding. The only way for the order to be processed is for you to reorder the items.
- **Processing.** Your payment has been received and you now have 24 hours to cancel the order.
- **Requested.** The order has been processed and is now either awaiting shipment or is being requested to the Vault. Your order has been received for processing. See “Track statuses of film order items” below for statuses that apply to each film within the order.
- **Canceled.** You or FamilySearch has canceled the entire order. To successfully cancel an order, you must cancel it within 24 hours from the time the order was placed. You should expect a refund notification within 4 business days if payment was processed. However, the transaction may not show on your statement immediately. You will need to check with your bank.
- **Executed.** All of the films in your order are Received, Returned, Renewed, or Canceled. If all films in the order are canceled, the order is canceled rather than executed.

### Track statuses of film order items:

- **Pending.** This film is waiting to be processed. No action has been taken yet.
- **Requested.** The order has been processed and is now either awaiting shipment or the request will be changed to “backordered”.
- **Backordered.** This status is set when we are in the process of making a copy of the film prior to shipment. This process may take up to 90 days before the film is ready to be shipped. A track status update email is sent notifying the patron of the delay.
- **Shipped.** This status is set when a film has shipped in the last 24 hours and is now in transit to the local family history center. If the loan type is short-term, the return date will be 90 days from the shipping date. You will receive an email notification.
- **Received.** The film has arrived at the selected family history center. Shipping may take up to 30 days, depending on where you are in the world. You will receive an email notification when your film arrives.
- **Returned.** The family history center has shipped the film back to FamilySearch. It is no longer at the center. This usually applies to short-term microfilm loans but can also apply to extended loans when they are returned. One week prior to the return date, an email is sent to the patron notifying them that their film is about to expire and that they should renew the film.
- **Canceled.** An individual film can be canceled by the patron within 24 hours when the order status is set to “Processing.” Once it is set to “Requested”, the order will be fulfilled. To request an individual film cancellation, contact Support. If you wish to cancel the entire order, go to your Recent Orders under My Account and Cancel the specific order. Canceling an order or individual film will activate a refund. Refunds can take up to 4 business days. Cancelling orders with a status “pending” will not activate a

refund because a “pending” order never received payment. A cancellation and refund email will be sent separately.

- **Renewed Status.** A film’s track status is set to “renewed” only for a film renewal. These orders update the return date only and are not processed for shipment because the films already exist in the center. A short-term renewal updates the return date 60 days. An extended renewal converts a short-term film loan to an extended loan. Since we don’t ship films for renewals, the order status will automatically be set to “Executed” if all of the line items in the order are renewals.

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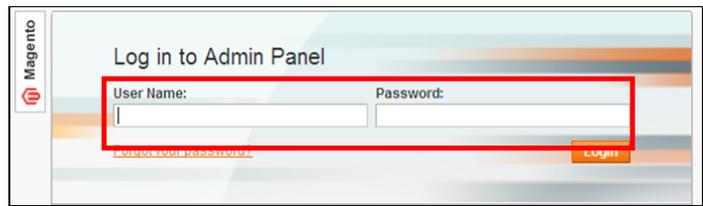
### Check Film Status

Do a film search for films that have been received by the family history center and have been placed in inventory. Check a film’s order status if the film has been ordered but not yet received.

To find a film in the family history center’s inventory, use the following steps:

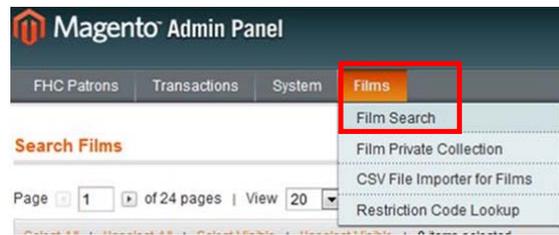
**Step 1:**

Enter your user name and password. Click **Login**.



**Step 2:**

Mouse over the Films tab, and click **Film Search**.



**Step 3:**

In the Film number box, enter the Film you would like to view.



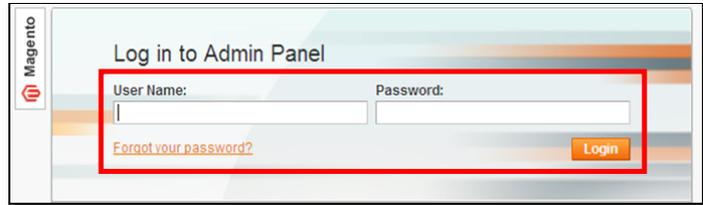
**Note:** You may filter your search using any of the columns. You may search by FHC Name, Order #, Patron first name, Patron last name, Patron email, Return Date, or Film Status. Use this functionality to create custom reports about your film inventory. Use your browser’s print button to print the reports if you prefer viewing the information on paper.

# Online Film Ordering for Directors

To find a film's status that has not been marked as shipped or received into inventory yet, but has been ordered, follow these steps:

## Step 1:

Enter your user name and password. Click **Login**.



## Step 2:

Mouse over the Transactions tab, and click **Orders**.

**Note:** You may filter your search using any of the columns. For example, search by Purchased On to see orders purchased on a certain date.



## Step 3:

Enter the **Order #**.

## Step 4:

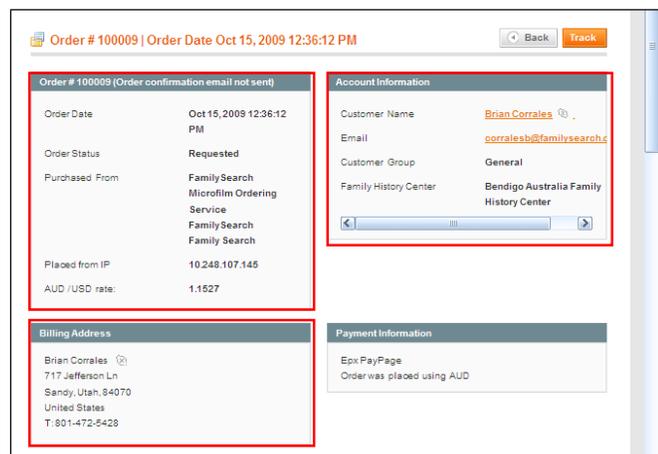
Click the **Search** button.



## Step 5:

Click the **View** link.

**Note:** Here you are able to view the customer's account information and billing address.



**Note:** In the Product column, you can find the film number. In the Track Status column is the status of the film.

Items	Product	Item Status	Track Status	Original Price	Price	Qty	Subtotal	Tax Amount	Tax Percent	Discount Amount	Row Total
	Extended Microfilm Loan SKU: microfilm-indefinite Film No.: 191	Ordered	Received	\$0.00	\$0.00	Ordered 1	\$0.00	\$0.00	0%	\$0.00	\$0.00

**Note:** If the film is not in inventory and marked as shipped, you should contact Family History Center Support to have the film marked as “Received.” Support will then investigate why the film did not get marked as “shipped.”

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## Mark Films as Received

After films are ordered, and you receive them in the mail, you will need to mark the films “Received” to add them into the family history center’s inventory. Films marked “Received” are considered ready for viewing. **Note:** Films are mailed to the mailing address associated with the family history center. Typically, this is different from the physical location of the center. If you need to change the mailing address, please contact Support.

**Step 1:** Once you have signed in to the Admin Panel with your user name and password, click the **Log in** button.



**Step 2:** From the Films drop-down menu, click **Film Search**.



**Step 3:**

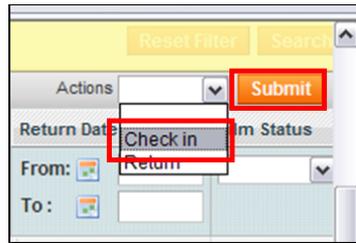
Click the **check box** next to each film you are checking in.



	Film #	Order #	Patron first name
ny			
<input type="checkbox"/>	127949	100020	Paul
<input type="checkbox"/>	1274989	100022	Paul
<input type="checkbox"/>	6000056	100022	Paul
<input type="checkbox"/>	1386658	100022	Paul

**Step 4:**

From the Actions drop-down menu, click **Check in**.



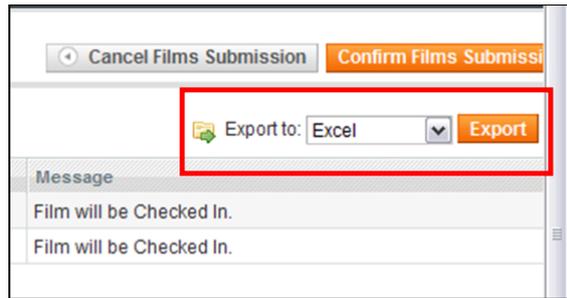
**Step 5:**

Click **Submit**.

**Note:** Films listed in inventory are ready for viewing by Family History Center patrons.

**Step 6:**

To save a copy of the report showing the films that were checked in, from the Export field, click the **down arrow**.



**Step 7:** From the drop-down menu, select **CSV, Excel, or pdf**.

**Step 8:** Click **Export**. Save your file to your hard drive.

**Step 9:** After the report has been saved, you will need to click the **Confirm Films Submissions** button.



**Note:** After the film submission has been confirmed, they are added to the inventory and an e-mail is sent to the patron.

## Mark Films as Returned

When films are ready to be returned, you will need to mark the films as “Returned.” When films are marked “Returned” they are no longer part of your family history center’s inventory.

### Step 1:

Sign into the Online Film Ordering admin panel with your user name and password. Click the **Log in** button.



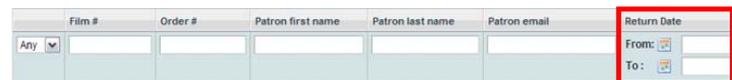
### Step 2:

From the Films drop-down menu, click **Film Search**.



### Step 3:

Find films that need to be returned within a date range, in the From: field; click the **calendar** icon to select a beginning date.



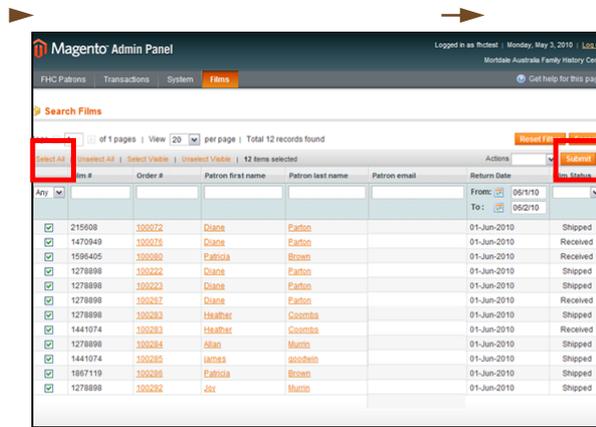
### Step 4:

In the To: field, click the **calendar** icon to select an ending date.



### Step 5:

To return all the films that have or will expire within the specified date range, click the **Select All** link. Alternatively, you can click each checkbox manually.



### Step 6:

From the Actions drop-down menu, click the **down arrow**.

### Step 7:

Click **Return**.

### Step 8:

Click the **Submit** button.

### Step 9:

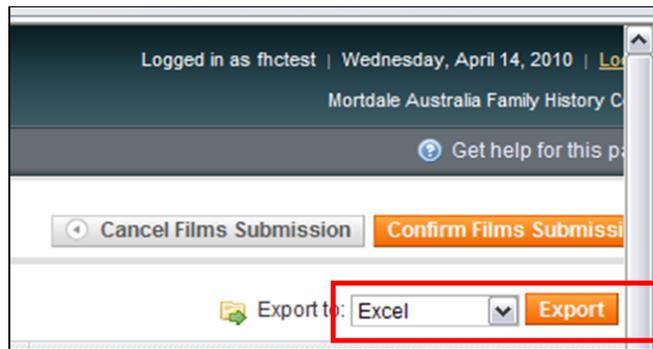
To save a copy of the report showing the films you checked in, from the Export field, click the **down arrow**.

### Step 10:

From the drop-down menu, select **CSV, Excel, or pdf**.

### Step 11:

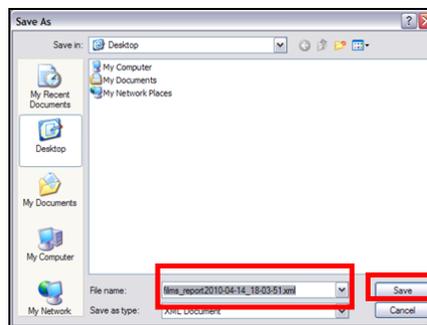
Click the **Export** button.



### Step 12:

From the File Download dialog box, click the **Save** button.

**Note:** Decide where you want to save the information on your computer.



### Step 13:

Click the **Save** button.

### Step 14:

After you have saved the report, you will need to click the **Confirm Films Submissions** button.



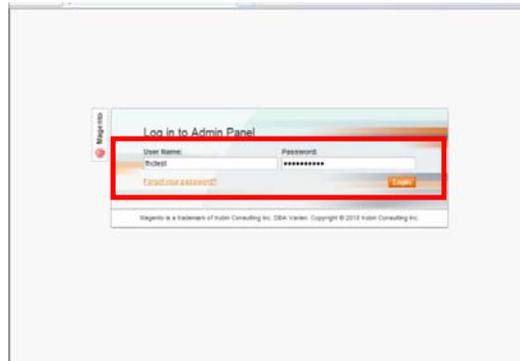
**Note:** Your films will no longer show in the Films Search. You can search for the order by going to Transactions and then Orders. Search for your order using the order #.

## Add Private Films to FHC Inventory

Family history centers can add films where no payment is needed and the film already resides in the center. Using this option allows you to select the loan type. The return date on a short-term loan is 90 days from today's date.

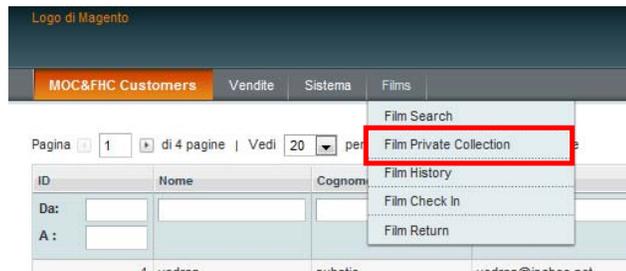
### Step 1:

Once you have signed in to the Admin panel with your user name and password, click the **Log in** button.



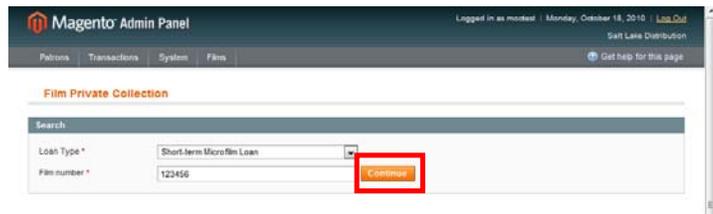
### Step 2:

From the Films drop-down menu, click **Film Private Collection**.



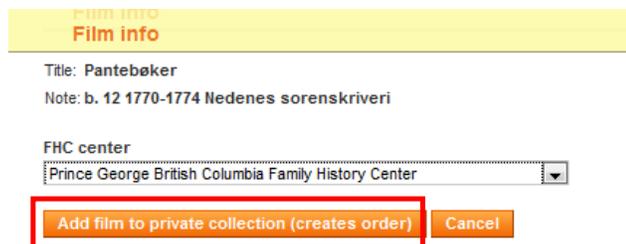
### Step 3:

From the Films drop-down menu, enter the film number, and then click **Continue**.



### Step 4:

Click **Add film to private collection**.



## Upload a CSV File

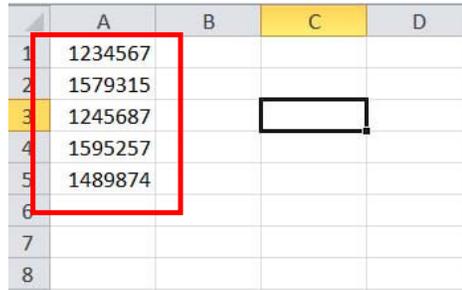
When you use the CSV import, it will assume all films are extended loans. If you need to upload a short-term loan, use the Private Film Collection option.

To upload a CSV file using the CSV File importer, do the following:

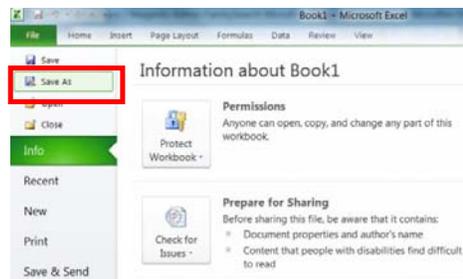
**Step 1:** Using a spreadsheet program such as Excel, open a spreadsheet. In the first column list all of the films you want to import.

**Step 2:** Save the file as a .csv file.

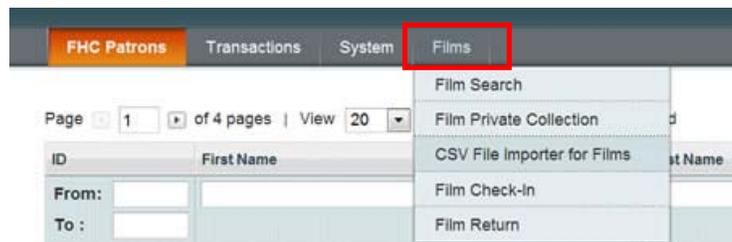
**Note:** If you save it as a regular Excel file, the films will not import.



	A	B	C	D
1	1234567			
2	1579315			
3	1245687			
4	1595257			
5	1489874			
6				
7				
8				



**Step 3:** From the Admin Panel, click on the **Films** tab.



**Step 4:** Click **CSV File Importer for Films**.



**Step 5:** Click **Browse** to find the CSV file on your hard drive.

**Step 6:** Click the **Upload Csv file** button.

**Note:** Films uploaded into inventory using this method will show as “Extended.”

If the upload was successful the films will display instantly. If there was a problem the film numbers will either appear as “0” or they won’t appear at all.

If you experience problems, please verify that the CSV file is formatted correctly and try again.

If the inventory now lists “0” or isn’t uploading, please contact Support.



## FHC Patron Information

The FHC Patrons tab allows you to manage patron information. These are patrons who have your location as their designated family history center. You can modify a patron’s address information, see their orders, or view restricted film information.

**Step 1:** Once you have signed in to the Admin Panel with your user name and password, click the **Log in** button.



**Step 2:** Click on the **FHC Patrons** tab.

**Step 3:** To find a patron, enter the last name in the Last Name field. Click the **Search** button.

**Note:** You can search by any of the fields showing on the bar. For example, search by zip code to see all patrons within the same zip code.



**Step 4:** To see additional information about a patron, click the **Edit** link.



**Step 5:**

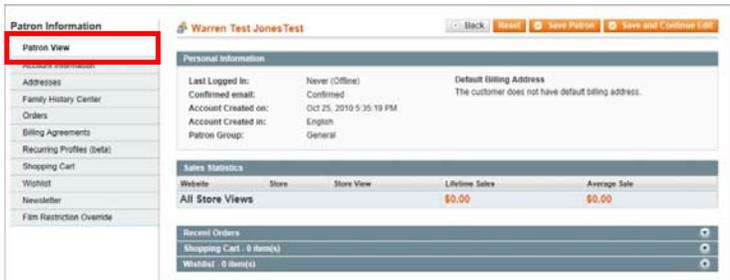
The **Patron View** tab allows you to see personal information about a patron such as address, sales information, and recent orders.



**Step 6:**

Click **Account Information**.

The account information tab allows you to make changes to a patron's name or other personal information. Once you have made any changes, click the **Save Patron** button or the **Save and Continue Edit** button.



**Note:** You cannot reset or change passwords using the Password Management screen. All passwords are now managed by LDSFamilySearch Accounts. To change email addresses also see LDSFamilySearch Accounts

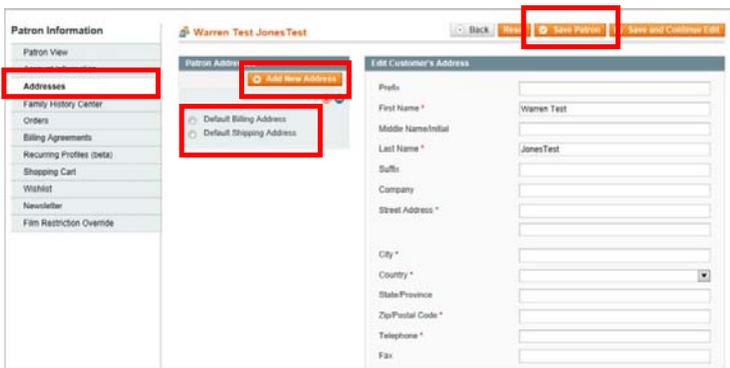


**Step 7:**

Click the **Addresses** tab.

The Addresses tab allows you to manage address information for patrons. Patrons can have more than one address attached to their name. To add additional addresses, do the following:

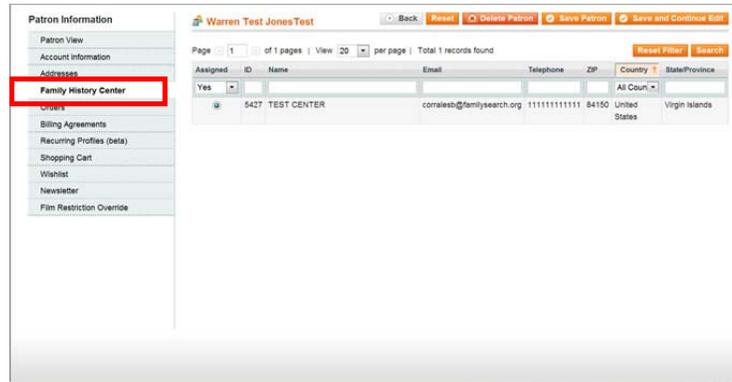
- Click the **Add New Address** button.
- Select **Default Billing Address** or **Default Shipping Address**.
- Enter the patron's address information into the fields provided.
- Click the **Save Patron** button.



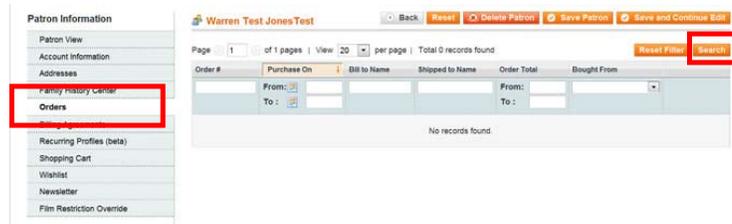
## Step 8:

Click the **Family History Center** tab. The Family History Center tab allows you to assign a family history to a patron's account. To do this, do the following:

- Search for the family history center by entering the name, email, telephone number, zip code, or state/province of the family history center. Click the **Search** button.
- Select the family history center by clicking the radio button next to the name of the center. From the Assigned drop-down menu, select **Yes**.
- Click the **Save Patron** button.



**Step 9:** Click the **Orders** tab. The Orders tab allows you to see all orders placed by a patron. You can search for an order using any of the search fields. For example, to search by order #, in the Order # field, enter the order # and then click the **Search** button.



**Step 10:** Click the **Film Restriction Override** to see restricted films a patron has been given permission to view.



### Film Pricing

If a patron has not signed into the Online Film Ordering system, he or she will see the global USD film or fiche price. To see the price for your family history center, the patron must be signed in. There is one standard microfiche price regardless of the number of fiche assigned to the microfiche number.

Microfilm renewals are the same price as the regular loan price, regardless of how many times you renew the film.

**Note:** We do not handle sales tax anywhere in the US EXCEPT for California which is subject to a “use” tax. California tax is city-based and is calculated based on the Family History Center's physical address. The use tax is already calculated into the film price for California. As a result, each FHC in California has a slightly different film price.

**Price Structure** (Film prices are subject to change. Please check films website for updated pricing.)

#### **Australia**

Short-term: 7.75 AUD

Long-term: 19.50 AUD

Microfiche: 7.75 AUD

#### **New Zealand**

Short-term: 8.50 NZD

Long-term: 21.25 NZD

Microfiche: 5.00 NZD

#### **British Isles**

Short-term: 7.50 GBP

Long-term: 18.75 GBP

Microfiche: 3.00 GBP

#### **United States**

Short-term: 5.50 USD

Long-term: \$13.75 USD

Microfiche: \$4.75

#### **Canada**

Short-term microfilm loan: \$6.00 CAD

Extended microfilm loan: \$15.00 CAD

Extended microfiche loan: \$5.00 CAD

#### **Austria, Belgium, Germany, France**

Short-term microfilm loan: 8,50 Euro

Extended microfilm loan: 21,25 Euro

Extended microfiche loan: 3,50 Euro

#### **Portugal**

Short-term microfilm loan: 4,25 Euro

Extended microfilm loan: 10,50 Euro

Extended microfiche loan: 1,75 Euro

### **Malta**

Short-term microfilm loan: 5,00 Euro

Extended microfilm loan: 12,75 Euro

Extended microfiche loan: 2,00 Euro

### **Cape Verde**

Short-term microfilm loan: 0,85 Euro

Extended microfilm loan: 2,00 Euro

Extended microfiche loan: 0,35 Euro

### **Switzerland**

Short-term microfilm loan: 13.00 CHF

Extended microfilm loan: 33.50 CHF

Extended microfiche loan: 5.00 CHF

### **Spain, Italy, Greece, and Slovenia**

Short-term microfilm loan: 6, 00 Euro

Extended microfilm loan: 15, 00 Euro

Extended microfiche loan: 2, 50 Euro

### **Cyprus**

Short-term microfilm loan: 5, 00 Euro

Extended microfilm loan: 12, 50 Euro

Extended microfiche loan: 2, 00 Euro

### **Poland**

Short-term microfilm loan: 15, 00 Zloty

Extended microfilm loan: 37, 50 Zloty

Extended microfiche loan: 6, 51 Zloty

### **Hungary**

Short-term microfilm loan: 1200.00 Ft

Extended microfilm loan: 3000.00 Ft

Extended microfiche loan: 501.50 Ft

### **Colombia**

Short-term microfilm loan: FREE

Extended microfiche loan: FREE

### **Guam**

Short-term microfilm loan: FREE

Extended microfiche loan: FREE

### Patron Assistance Policy

- Do not openly advertise that films can be ordered by using Family History Center computers. You are allowed to mention that patrons can order films on any computer wired to the Internet such as computers found at home, work, public libraries, or even the Family History Center. **Do not give the impression that we are soliciting our computers to be used as kiosks for film ordering.**
- Do not directly assist patrons in completing an order online. If they need assistance or training in order to successfully place an order, go to a separate computer and walk them through the steps. Once they understand the process, exit out of the website and have the patron begin again from the beginning. **You should not be present during the ordering process**, especially on the final steps when the patron enters personal information such as billing address and credit card information.
- Do not place an order for a patron using your own personal credit card or the Church's, even if the patron reimburses you with cash. **Never accept payment from a patron.**

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### Microfilm Use Agreement

The following is the agreement each patron signs before placing a microfilm order:

#### **Terms and Conditions for Access to Microfilm:**

You have requested that FamilySearch International (“us,” “we” or like terms) loan one or more of our microfilm to a Family History Center (“FHC”) where you can view the microfilm.

You acknowledge that all microfilm loaned remains our sole property. You agree that you will not remove microfilms from the FHC to which they are shipped. You agree that you will not make any unauthorized copies of the images on a microfilm in any format (photocopy, digital or analogue photos, video, etc.). You agree that use of some microfilm is restricted based on your geographic location or your membership in The Church of Jesus Christ of Latter-day Saints. If you provide untrue information when requesting a microfilm, that microfilm may be returned to us without refund of any service fees paid. Additional legal restrictions on the use of microfilm may be posted in at the FHC, on the packaging, or as part of the images within a microfilm. You agree to fully and carefully abide by all such restrictions.

You may only view microfilms at a FHC during its hours of operation. We are not responsible for your inability to view a microfilm at your selected FHC or any FHC. Microfilm that you request will typically be delivered to a FHC between 7 and 180 days after your request is sent depending on many factors. We are under no obligation to deliver the microfilm and may unilaterally cancel your order in our sole and absolute discretion. Microfilm will not be shipped to a FHC you designate unless your service fees have been successfully collected (via the credit card or bank account information that you provide). If we determine a microfilm is no longer available for loan or cannot be delivered, service fees paid for delivery of that microfilm will be refunded to you. If you request multiple microfilms, they may be shipped separately (and at different times) to the FHC. Delivery date cannot be determined via this Web site. You should contact the FHC to inquire about microfilm you have requested.

You agree to handle all microfilm with care and as instructed by FHC staff members. You are responsible for the damage and cost resulting from your misuse or mishandling of the microfilm. Microfilm are provided ‘as is,’ and we do not warrant or guarantee that any microfilm will be in any

certain condition, that it will contain the information you are seeking or that the images on a microfilm are legible. The loan period for each microfilm is 90 days, which begins when the film is shipped from by us to the FHC. You may renew the loan for 60 additional days via this Web site. Renewals must be initiated at least ten days before the 90-day loan period ends. You must show the FHC a copy of the email you receive as evidence of your renewal. At the end of the loan period, the FHC will return the microfilms to us. In addition, we reserve the right to withdraw any microfilm from any FHC at any time for any or no reason. You will have first priority to use microfilms you have requested, but acknowledge that other visitors to a FHC may, without cost, also have access to and use those microfilms.

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### FamilySearch Support

#### **E-mail**

- [films@familysearch.org](mailto:films@familysearch.org)
- Use the Contact Us link at the bottom of the FamilySearch Microfilm Ordering Web site.

#### **Toll-free telephone numbers**

- To find the toll-free number in your area, click: <https://www.familysearch.org/help/contact> .