

Stake Indexing Roles

Here is a brief summary of the roles in a stake indexing program and how they work together.

Stake Presidency

The stake presidency oversees family history and temple work in the stake. They:

- Preside over the work of salvation in the stake, which includes temple and family history work.
- Assign one or more high councilors to help oversee family history and temple work.
- Determine whether the stake should participate in FamilySearch indexing.

High Councilor

The high councilor assigned to temple and family history work coordinates family history efforts in the stake. He meets regularly with the stake presidency to report on progress in temple and family history efforts and to receive counsel. He also:

- Instructs high priests group leaders in their temple and family history responsibilities.
- Coordinates special programs, such as a stake indexing program, and recommends an individual to be called as a stake indexing director.
- Coordinates stake resources.

Stake Indexing Director

The stake indexing director oversees the FamilySearch indexing program. He or she:

- Recruits indexers.
- Selects arbitrators.
- Trains stake indexers and arbitrators.
- Reports to the assigned high councilor.
- Sets an example in doing family history and temple work.
- Under priesthood direction, coordinates computer schedules at the family history center for FamilySearch indexing, if needed.

Assistant Stake Indexing Director

An assistant stake indexing director assists the stake indexing director. As needed, he or she:

- Performs administrative duties assigned by the director.
- Coordinates work in wards and branches that have large numbers of indexers, or supervises a group of indexers who index in non-native languages.

Indexers

While there are many indexers who volunteer their time outside of their Church callings, members may be called to serve as indexers. They are called at the ward level and directed at the stake level.

The time that individual workers devote to indexing can vary widely. Members who have callings in addition to indexing 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. Indexers:

- Perform FamilySearch indexing and arbitration tasks.
- Set an example in doing family history and temple work.

Recipe for Success

When you learn the basics of baking, you learn there are certain steps in the recipe to follow. Similarly, there are three basic steps for creating and maintaining a successful stake indexing program:



- 1** **Recruit** and train indexers and arbitrators.
- 2** **Meet regularly** with your stake high councilor.
- 3** **Make goals.**

The rest of this course will discuss specific ways to accomplish these three steps.

Recruiting Indexers

As the stake indexing director, one of your main responsibilities is to recruit others to assist in indexing efforts. Refer to the chart below to find out more about who to recruit and how to recruit them.

	Why they make the perfect indexers?	Challenges	Recruiting Suggestions
Traveling Members	Desire to contribute, indexing doesn't take long	Little Time	Recommendations from ward leadership
Seniors	More time, find joy in service	Little computer experience, old equipment	Recommendations from high priests group leaders, invite them to volunteer as an indexer in their spare time
Youth	Time on their hands, parents would love to see them involved in this	Lack of knowledge of history	Contact stake/ward youth leadership, competitions
Homebound	Time on their hands, opportunity to serve	Might have other priorities	Contact stake/ward leadership, visit
Community Members	Interest in finding family roots, interest in local projects	Might have other priorities	Flyers at public locations (like a library), talking with other congregations
Genealogical Societies	Interest in genealogy, always looking for additional resources, interest in local projects	Might have other priorities	Contact a society director for possible interest, contact stake public affairs rep. to collaborate

In addition to these suggestions for specific audiences, here were some of the general ideas for recruiting, as discussed in the clip:

- Start talking to people about indexing
 - Be creative
 - Host training classes
 - Send welcome e-mails
 - Ask Bishop for opportunities to teach
 - Include youth groups
 - Use local organizations, newsletters, and other resources
 - List contact information in weekly bulletins
 - Look for those interested in starting family history
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Selecting Arbitrators

Not everyone can or needs to be an arbitrator. Here are some hints to help you know how to select arbitrators for your stake.

For an arbitrator, you want to select an indexer who:

- Has indexed at least 2,000 records (according to Ward Statistics)
 - Has a low redo batch number (< .01% of number of records indexed)
 - Is detail-oriented (double-checks their works, takes time to do thing correctly)
 - Follows online instructions (follows field helps, knows about Project Info. tab)
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Training Suggestions

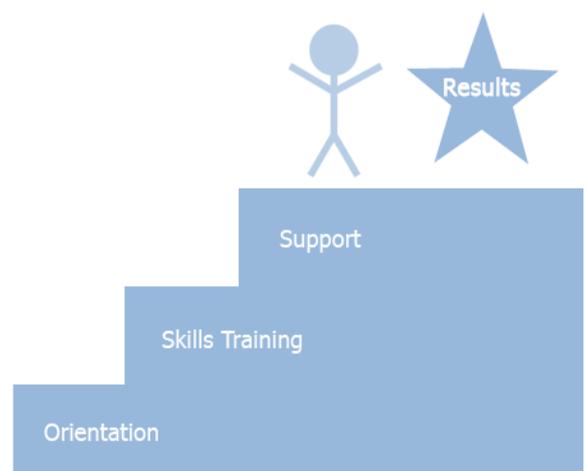
As you work with stake indexers and arbitrators, check to make sure they have received the orientation, skills training, and support they need for success. Examples are listed below.

Orientation could include:

- A brief overview of the indexing or arbitration process.
- An explanation of the need for accuracy.
- A demonstration of how to access the tutorials for FamilySearch indexing or arbitration.
- An explanation of how to find both general and project-specific instructions.

Skills training could include:

- How to use computer software programs.
- How to read specific historical documents.
- How to read and index specific historical documents.



Support could include:

- Expressing appreciation and encouragement.
- Identifying areas where mistakes are being made and explaining how to correct or avoid them.
- Sharing reports on the progress of indexing and arbitration within the stake.
- Answering questions and sharing ideas.
- Giving indexers an opportunity to share with each other the blessings they experience as they perform this work.

As a result:

- Volunteers gain confidence in their own abilities.
 - Volunteers learn new skills and feel appreciated.
 - Volunteers experience a feeling of cooperation, unity, and enthusiasm for family history work.
 - Volunteers produce top-quality indexes.
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Working with your High Councilor

In stakes where there is strong leader participation in family history, including strong participation by high councilors, name submissions to the temple are double the average of stakes that do not have much leader participation. Request regular meetings with your high councilor. Begin by asking if you can teach them how to index. As time goes on, review specific examples of how indexing blesses the lives of those who participate. Other ways to help leader participation are listed below:

- Share reports on stake indexing progress.
 - Set goals that are meaningful to your stake.
 - Consider asking local leaders to help encourage and motivate indexers.
 - Establish action items for follow-up at your next meeting.
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Administrator Set-Up

It's your job to call FamilySearch to establish your role as a stake indexing director. To get set up as an administrator, follow these three steps:

1. Register as a volunteer online at indexing.familysearch.org, or sign in using your LDS account.
2. Install the Indexing Software (<https://indexing.familysearch.org/newuser/nugetstarted.jsf#>)
3. Call FamilySearch to register as an administrator. (U.S. and Canada: 1-866-406-1830) (Outside US, look for phone number at <https://contact.familysearch.org/en.htm>.)

Stake Indexing Goals

In order for a stake indexing program to be successful, it must be aligned with the goals of the stake. Record the goals of the stake and brainstorm some ways you could use indexing to help fulfill those goals. Select the ideas you think you'd like to focus on and write them down at the bottom. You may also want to refer to your previous indexing goals to help review what worked in the past.

Month/Year:

Stake Goals	Indexing Goals

Final Three Indexing Goals:

1. -----

2. -----

3. -----

Approved by Stake High Councilor (date)

Sign In

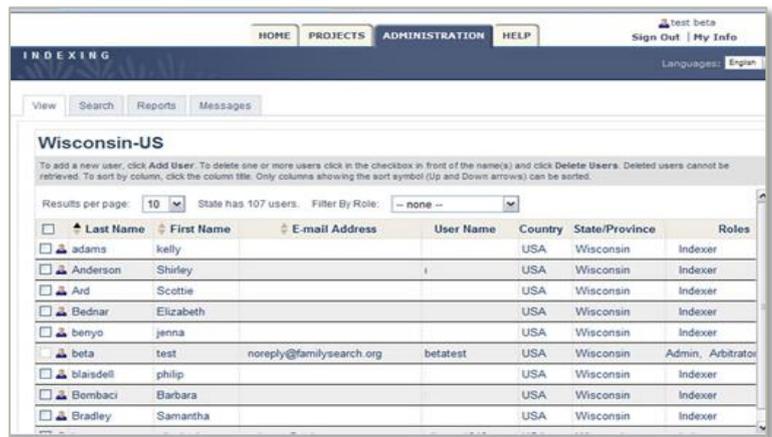
1. Go to: www.indexing.familysearch.org
2. If needed, click the **Language** drop-down list, and select the language.
3. In the upper-right corner of the page, click **Sign In**.
4. Type your user name and password, and click **Sign in**.



View User Information

On the View tab, a list of all the current users in your group is shown.

- To organize the list of users, click a column heading at the top. For example, to list names alphabetically, click **Last Name**.
- To view users with a certain role only, such as arbitrators, at the top, click the **Filter by Role** drop-down list, and select a role.
- To view or edit a user's information, click the individual's name.



Search for a User

1. Click the **Search** tab.
2. Type the individual's name, user name, or e-mail address. You can type part of the name with an asterisk (*). The asterisk can go in front, in the middle, or at the end of a partial name.
3. Click **Search**.
4. To view or edit a user's information, on the search results, click the individual's name.



Edit User Information

You can edit stake and ward information or assign an indexer the role of arbitrator or group administrator. You cannot update other user information. The user can update that information when he or she signs in on the Web site.

1. On the **View** tab, click the individual's name.
2. Click **Edit**.
3. In the Subgroup or Ward field, enter any changes.
4. To assign a role, click the box next to **Arbitrator** or **Group Administrator**.
5. Click **Save**.

Daniel Rossi (drossi)

You may change the user information that appears inside the boxes. To save the changes click **Save**. To leave this page, click **Cancel**.

User Name: drossi
 First Name: Daniel
 Last Name: Rossi
 Display Name: Daniel Rossi
 E-mail Address: abc@xyz.com

Choose stake name from list which appears while typing.

Group or Stake:
 Subgroup or Ward:

Street Address:
 City:
 State or Province:
 Country:
 Zip or Postal Code:
 Phone Number:

Roles:
 Group Administrator
 Arbitrator

View or Print Reports

1. Click the **Reports** tab.
2. Select the type of report.
3. Select the range, such as quarterly.
4. Select the specific dates.
5. Select the format.
 - **HTML:** Use this to view the report online.
 - **PDF:** Use this to e-mail or print the report.
 - **CSV:** Use this spreadsheet format to import the statistics into OpenOffice Calc to make graphs or charts.
 - **XLS:** Use this spreadsheet format to import the statistics into Microsoft Excel to make graphs or charts.
6. Click **Generate Report**.

INDEXING | HOME | PROJECTS | ADMINISTRATION | HELP | Sign Out | Language

View | Search | Reports | Messages

Reports for Wisconsin-US

To view a report select from the following list.

Report:
 Range:
 Date:

Report Description:
 Number of names submitted by the State and what each Subgroup contributed.

Format:

State Statistics

Select Arbitrators

1. To see which volunteers are already arbitrators, generate a Stake Directory report.
2. To find new arbitrators, generate a Ward Statistics report. Look for indexers who:
 - a. Have indexed at least 2000 records.
 - b. Have a low redo batch number (<.01% of the number of records indexed).
3. Contact the individuals and ask:
 - a. Are you detail-oriented? Do you double-check your work?
 - b. Do you follow the Field Help instructions?
 - c. Do you read the Project Information tab and follow those instructions?
4. If so, invite them to be an arbitrator. Have them take the Arbitrator training lesson available online.
5. Edit their user information and assign the role of Arbitrator.

Individual Statistics	
Zane Jacobson	
Indexed	5,201
Arbitrated	0
Redo Batches	1
Joe Richardson	
Indexed	3,113
Arbitrated	0
Redo Batches	1
Sharleen Hallett	
Indexed	535
Arbitrated	0
Redo Batches	0

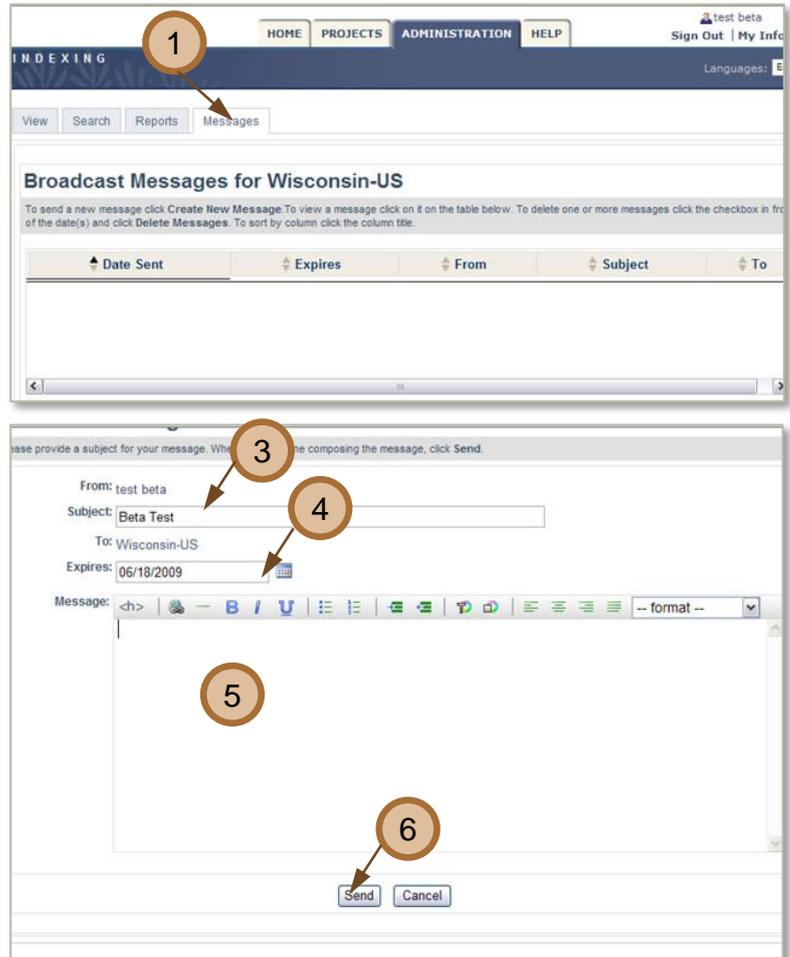
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2b

Send a Message

You can send messages to the indexers and arbitrators in your group. You may want to notify users when you have a training class, communicate statistics or goals, or address other concerns.

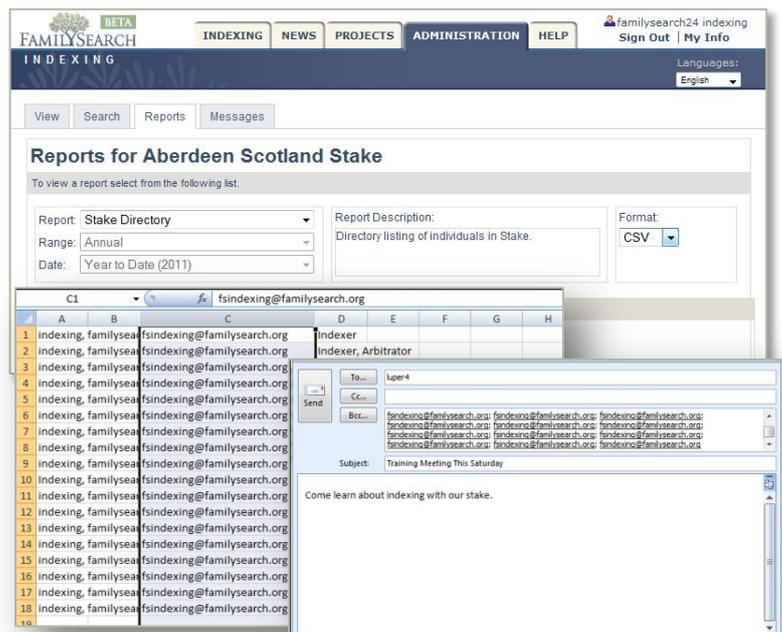
1. Click the **Messages** tab.
2. Click **Create New Message**.
3. Type the subject for your message.
4. Click the calendar to adjust the expires date, if needed. The expiration date indicates when the message will be automatically deleted by the system. The default is 30 days.
5. Type the message details. **Note:** You can enter up to 2,000 characters. Do not copy and paste the text from Word.
6. Click **Send**. The message will be sent to all users in your group.
7. To view a sent message, click the message in the list.
8. To delete a message, click the check box for the message, and click **Delete Messages**. The message is deleted for all users.



Send an E-mail

The benefit of a message is that it appears in the Messages tab. Everyone can view the message whether or not they have an e-mail address. However, you can send a message to select individuals using their e-mail address.

1. Generate a Stake Directory report in CSV format.
2. Copy the e-mail addresses from the spreadsheet into the "BCC" field of an e-mail.
3. Type your message, and send the e-mail.



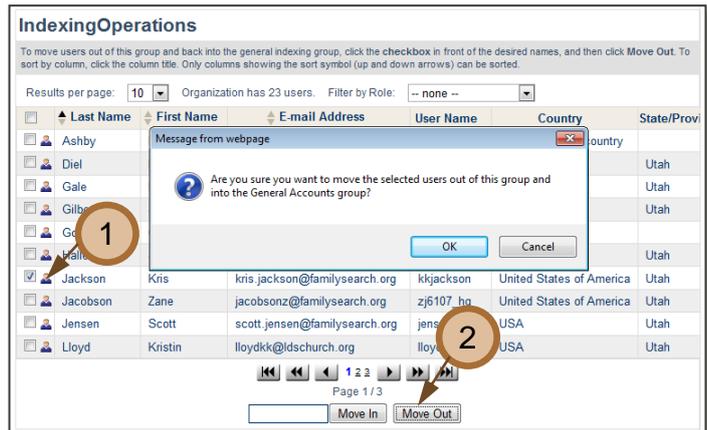
Remove a User

Follow these guidelines for determining when to remove users.

- If a user will be gone for awhile but plans to return to do more indexing, leave him or her listed in the system.
- If an LDS Church member is moving, show him or her how to update the My Info page to select the new stake.
- If a user no longer wants to participate in indexing, remove that user.

1. On the View tab, click the **box** next to the name of the user you need to remove.
2. Click **Move Out**.
3. On the Are you sure... message, click **OK**.

The user is removed from your stake or group.



Add a User

Most users will select a group or LDS stake to belong to when they sign in to indexing. However, in administration, you can add a user to your group, if needed. You will need the person's user name in order to add him or her to your group.

1. At the bottom of the View tab, in the box next to Move In, type the person's user name, and then click **Move In**.

Note: If you mistype the user name, an error message listed in red in the lower left corner will indicate that no user exists with that user name. You will need to retype the name, and click **Move In** again.

The person will be added to your stake or group.

