

Quick start guide to collaborative genealogy

by Andrew Murphy, 18 November 2021

Collaborative genealogy can be a lot of fun, but requires more effort. The benefit is that your effort contributes to a more permanent work done and maintained by many people. So here is a quick start guide. It's the way I do it, so please adapt whatever parts you find useful.

First, prepare a filing and storage system, both physical and digital. Treat it as the archive of your work, as if someone else will one day inherit it. Make it as simple and clearly organized as you can.

For your physical archive, start with one of those small, heavy duty cardboard storage boxes. Mine measure 12 inches wide by 12 inches tall by 16 inches deep. I put a dated sticker on an inside flap to say what is in the box. Standardizing the box type and size lets me stack them easily and expand as necessary without any one box being too heavy to move.

Inside the box, I use large envelopes (9 inch by 12 inch clasp envelopes) to store papers and letters and similar items. I label each large clasp envelope with the name of a person or topic, and place them in the box in alphabetical order.

For a digital archive, start with a single folder to hold everything. Inside that folder, make a set of two folders: one for incoming items, and one for study topics. (I also have a third, archive folder, to store an intact copy of my old genealogy efforts.) The incoming items folder is for stuff you obtain but don't have time to work on right now. The study topics folder is where that stuff will eventually go, as you work on it.

Inside the study topics folder, make a set of folders that makes sense to you. I have family name folders — just the last name. And under the family name folders, I have folders with the full name of individuals and a significant date to distinguish them.

Here are some examples of folder paths and names:

```
Documents\FamilyHistory\IncomingItems>Email_Person_Name_2021-08-17_11-31
Documents\FamilyHistory\IncomingItems\Photos_Other_Person_Name_2021-06-30
Documents\FamilyHistory\StudyTopics\Morrison\Johnathan_D_Morrison_died_1849
Documents\FamilyHistory\StudyTopics\Morrison\Matilda_Morrison_born_early_1800s
Documents\FamilyHistory\StudyTopics\Smithfield\Katie_E_Smithfield_born_late_1850s
Documents\FamilyHistory\StudyTopics\Wexley\Barbara_Wexley_born_1839
Documents\FamilyHistory\StudyTopics\Wexley\James_Wexley_born_early_1800s
```

In each of these individual study topic folders, I have a journal document, a story document, an “incoming items” folder, a “reference items” folder, and a “cold storage” folder. The journal is a simple text file, in which I write all my notes and thoughts about researching this individual study topic. The story document is a nicely formatted word processing document, meant to tell the story of the individual or study topic. This is what I would show other people when they first ask about that individual. When a new item arrives, I put it into the study topic's “incoming items” folder. When I get around to working on it, I'll write about the item in my journal, and then put the item into the “cold storage” folder unless I use the item as a reference in my story document. In that case, I put the item into the “reference” folder so that I can find it easily when someone asks about that reference later.

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Here is an example of one study topic, organized in a “Matilda_Morrison_born_early_1800s” folder:

Journal_Research_Matilda_Morrison_born_early_1800s.txt
Matilda_Morrison_born_early_1800s.odt
Cold_storage_items\Story_snapshots\2020-07-30_15-14\Matilda_Morrison_born_early_1800s.odt
Cold_storage_items\Story_snapshots\2020-08-15_09-28\Matilda_Morrison_born_early_1800s.odt
Incoming_items\Person_Name_letter_2020-12-22.pdf
Reference_items\1850_United_States_Federal_Census.jpg

That’s my personal work system, and it does pretty well.

When working with other people, or showing them some interesting tidbit, the first question they ask is, “How do you know?” To answer that question really well, we apply what is called the “genealogical proof standard” to our work. See https://en.wikipedia.org/wiki/Genealogical_Proof_Standard and <https://bcgcertification.org/ethics-standards/> for more detail and related topics. Also take a look at <https://www.ngsgenealogy.org/learning-center/> and <https://bcgcertification.org/learning/> for general topics that could interest you.

And now, we are ready to collaborate.

The Web has several modern collaborative genealogy sites, where we all contribute to a single large family tree instead of separated smaller trees. I’ve chosen to work on WikiTree.com <https://www.wikitree.com/> because of its features, the way it works, and its sense of community. I learned about WikiTree by reading its home page and the pages it links to, and by watching the videos linked from the home page.

After making an account, I studied a series of pages:

- the style FAQ at https://www.wikitree.com/wiki/Help:Style_FAQ
- profile biography help at https://www.wikitree.com/wiki/Space:Biography_Creation_Helper
- examples of great profiles at <https://www.wikitree.com/wiki/Help:Examples>

And early on, I checked out the WikiTree profile improvement project at https://www.wikitree.com/wiki/Project:Profile_Improvement . This helped me create quality work that others would appreciate.

Now, let’s say I found some new information about Amelia Earhart. WikiTree has a profile at <https://www.wikitree.com/wiki/Earhart-1> . Already it has a well developed biography and set of sources, so I review those to see whether what I’ve found is already there. Once I log in, there is a Collaboration section in the profile’s right column that gives me several collaboration tool suggestions: editing the profile; sending messages to the profile manager; reading and commenting at the bottom of the profile; and asking questions in the genealogist-to-genealogist forum. Also, near the top of the profile’s right column is a box saying this is a “project protected” profile, which means there are some additional steps to check through its link. I can look at past collaborators by clicking the “Changes” tab at the profile top. The “Changes” tab will show every past edit done to the profile, along with who did it and when they did it. All these options can tell me whether my new information was handled before in Amelia Earhart’s WikiTree profile.

So, this has been a quick start introduction to collaborative genealogy. In summary, organize and prepare your work for questions from others; learn community standards and expectations; and familiarize yourself with collaboration tools. From then on, look things up, ask questions, and document your sources!