# Chapter 9: Online Collaborative Tools

This course teaches researchers about the importance of using online collaborative tools. These are tools to use to complete your work online with the capability of collaborating with other people anywhere in the world. Genealogical research is not simply a solo endeavor. It historically has had, and continues to have, the characteristics of sharing, networking, and teamwork.

Three main groups of online collaborative tools discussed in this chapter are cloud computing, wikis, and social media.

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## Section 1: Cloud Computing

The **cloud** consists of information and data saved and backed-up on servers (very powerful computers) located throughout the world. You can interact (send and receive information) with these servers anywhere using an internet connection. The quick and easy access to cloud computing makes it a wonderful tool for researchers. For example, the Google Drive application program allows you to upload and download, store and access, and share or limit access to documents, spreadsheets, images, videos, audio files, and more anywhere in the world using a device with connection to the internet. Cloud computing can also be used to work collaboratively with others on the same projects from anywhere in the world.

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### Cloud Computing Terminology

* **Backup application:**is an application or program that can be set up to copy and backup information at identified intervals from a computer to the cloud to be retrieved if the computer crashes and the data must be restored, for example Backblaze.
* **Cloud:**interactable information and data that is stored, saved, or backed-up on remote servers.
* **Cloud application:**a cloud-based application or program to access data on servers that processes tasks on the computer device being used. Users can interact with this type of application without an internet connection, but an internet connection is required to download or upload and backup or sync data, for example, Google Drive.
* **Cloud computing:**is any service that allows interaction with the cloud.
* **Sharing access:**is a setting on applications or programs to set limitations or allow others access to and interact with data that is not their own.
* **Storage application:**is any service that allows you to manually store, copy, or backup files on the cloud, for example, Dropbox.
* **Syncing application:**is an application or program that constantly updates and copies information to and from multiple computers and devices to the cloud and also allows sharing of files with others and every copy on every machine connected to the internet, for example, Microsoft 365.
* **Web applications:**a web-based application and program to access data on remote servers that processes tasks on the server alone with continuous internet connection. This type of application becomes unusable without an internet connection, for example, an online banking app.

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### Cloud Computing Categories and Functions

Cloud computing can be broken up into different categories and two of those are cloud applications or programs and web applications or programs. These categories are similar, but have some distinct features that set them apart. They are defined above.

Cloud and web application or programs can be defined by function, and two of those functions are whether the application or program stores or if it syncs data and information. Syncing is the automatic uploading or downloading of data. Storing is manual uploading or downloading of data. Storage and syncing applications or programs are defined above.

Keep in mind that applications or programs may include a mix of these categories (cloud applications and web applications) and functions (syncing and storage). For example, a program may primarily focus on syncing documents, but allow you to manually store documents, as well. A program may primarily be a web application, but allow for cloud application capabilities, as well. Google Drive and Microsoft 365 allow for syncing and storage, as well as the capability of a web or cloud application (i.e. to work online or offline - offline as long as the application is connected every now and then to sync or manually upload or download data).

It is highly encouraged that genealogical researchers not only use cloud computing for data access and collaboration, but to also use cloud computing as a personal backup. This way, researchers always have at least one copy of data stored away from home (in case something happens to the house). Some cloud applications or programs, called backup applications or programs, can be set up to copy and backup data automatically through the function of syncing. Other cloud storage applications or programs can be used for a personal backup, but the copy and backup of data must be done manually through the function of storing.

Be aware that the decision of which application or program to use for storing and sharing data, as well as the decision of which application or program to use for backup, must account for both the category type and the function type of the application or program.

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### Application or Program Choice Considerations

Here are some things to take into consideration as you decide which application(s)/program(s) to use for collaboration:

* **File Types:** Many of these programs typically are able to open documents from the Microsoft Office Suite, but some may also support editing images, audio, or video. Currently, there is no single editor that can work with all of these file types, so you may have to find one for documents, one for images, and one for video. However, you will still want to check the files they support, because an image editor may only support JPEG files and not TIFF or PNG files.
* **Storage and File Size Limits:** Some programs set limits on the total amount of information you can store, or they may limit the size of individual files.
* **Collaboration:**Some programs may allow multiple individuals to edit the same file at the same time, while others may only allow for one individual to edit at a time.
* **Editing Capabilities:** Online editors may have very different capabilities. Make sure your editor can meet your needs in terms of formatting options and/or what can be inserted into the document.

Here are some things to take into consideration as you decide which application(s) or program(s) to use for storage service and backups:

* **Ability and Ease of Syncing:** The better programs will allow you to choose a folder that syncs to the cloud. Once you select the folder, every file in the folder is automatically backed up on the cloud. Usability of the syncing feature is also very important. Some programs are more difficult than others in designating which folders or files you will sync.
* **Storage Amount:**Different programs allow for different amounts of free storage. If you are working with many larger files, this will be a very important factor in your decision.
* **Sharing Options and Usability:** You may want to allow others to preview or edit a file. When you share a file, you want the experience to be as simple as possible for the other user.
* **The Device(s) You Will Use:**The available features of a cloud application/program can vary depending on which device you use to access the application or program. Consider whether you will use a desktop, laptop, tablet, smart phone, or a combination of devices to access your cloud files as well as your operating system (Mac OSX, Windows, Android, Apple iOS, or Windows Mobile). If you plan on using a mobile device, check the available apps to determine compatibility of a particular cloud service with your device. Also check to see which features are enabled for a mobile device and which features you will need to access through your desktop or laptop. For example, some mobile apps allow you to upload only certain types of files from certain devices; some allow you to edit some files directly in the app, while others require additional apps to edit files.

As you decide which application or program to use, you can always perform a search on a search engine to find the most up-to-date information about it. For example, you could use Google to search for, “What is the available storage amount of Google Drive?” or “How much does extra storage on Google Drive cost?” You can also go directly to the application or program site and search the site for answers.

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### Google Drive

Components of [Google Drive](https://www.google.com/drive/) for individuals and for businesses (Docs, Sheets, Slides) were discussed earlier in this textbook.

Google Drive is a productivity cloud-based application. It has a web-based application version called Google G Suite. Both contain the same components as discussed earlier; the only difference between the two versions is the category of application or program, i.e. how and where the programs process data. Since this chapter is about cloud computing, this following information will focus only on Google Drive.

Consider the Google Drive application pr program as a data access and collaboration tool, as well as a backup tool, for genealogical researchers.

Google Drive can be used as a data interaction and collaboration tool by genealogists because you can create and edit new items, such as research reports or research logs. You can also collaborate with others by setting sharing or access permission. When you share things with others, you can allow them only partial access, such as the access to view only, or you can allow them full access, such as to view and edit. Or you can allow anyone with the link to view an item or set a password in connection with the link to allow viewing.

Google Drive can be used as a storage and backup tool by genealogists. Google Drive has both functions to sync and to store. As you use the Docs, Sheets, or Slides components, the application or program automatically syncs your work, as long as you are connected to the internet. You can also store your work by manually uploading or downloading files. Keep in mind that Google Drive will automatically sync folders and files as long as they are components of Google Drive; it will not automatically sync folders or files that originated from another application/program (like Word or image files).

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### Microsoft 365

Earlier sections of this textbook discussed the Microsoft Office components Word, Excel, and PowerPoint.

The installed Microsoft Office productivity program can be set to be a web-based application/program, but it also has a cloud-based application or program, which is called . Microsoft 365 is available through a paid subscription. It is also free to BYU-I students:

Just like Google Drive, Microsoft 365 can be used by genealogists as a data interaction and collaboration tool, as well as a storage and backup tool.

It can be used to create research items, such as research reports or research logs, and it can also be used in collaboration with others by setting sharing and access permissions.

When you use Microsoft 365 as a backup tool, you are really using the component. It will automatically sync information as long as the item containing the information is a Microsoft 365 component and it is connected to the internet, but genealogists must manually upload files if they do not originate in Microsoft 365 (for example, PDF or audio files).

### Professional Considerations Scenario

To grasp the power of cloud computing, imagine the following scenario:

* **Background:**You are working on a large research project and are planning a trip to the FamilySearch Library in Salt Lake City, Utah.
* **Preparation:** Before leaving for Salt Lake City, you use your home computer to search the catalog at FamilySearch.org, create a research log with a list of microfilms you want to search, and place it in your Google Drive folder. You set access permissions to share that folder with your client.
* **As You Research:**When you reach the library, you pull out your mobile device which syncs to Google Drive and open your research log in your Docs app. You obtain all of the microfilms that you need and search them for information. When you do not find pertinent information, you mark it on your research log. When you do find pertinent information, you mark it on your research log, scan it using a computer at the library, and use a browser (on the scanning computer) to upload the images to the appropriate folder on your Google Drive account. This entire time, your client can view your findings from their Google Drive account.
* **At Home**:When you return home, you turn on your computer and enter what you found into a genealogical database (assuming you haven't already done that on your mobile device). Without printing a single piece of paper, carrying around a laptop, or even bringing a flash drive, you have organized electronic copies of every pertinent record, a completed research log, an online backup of your documents, and a very satisfied customer.

### Family Considerations Scenario

To grasp the power of cloud-based collaboration, imagine the following scenario:

* **Background:**You would like to surprise your parents for their 50th wedding anniversary by writing a family history about your parents, yourself, and your siblings. You have written the section about your parents and now you would like each of your siblings to contribute by writing a page or two about their lives and then add it to the final family history. They all give you permission to share their information and compile the family history. Unfortunately, you and your siblings live in different states and you worry that some of your siblings might not get around to mailing you their written pages. You decide to try cloud-based collaboration so everyone can work on the same document wherever they are located.
* **Preparation:**You create a document on Microsoft OneDrive, add a title, add the section about your parents, and then type section headers for each sibling.
* **Collaboration:**You create a shareable link to the document (making sure that the shareable link allows everyone to edit, and not just view, the document) and send the link to all your siblings. Whenever you get a chance to write your section, you go to the Microsoft OneDrive document and begin typing. Your siblings then use the link you sent them to open up the exact same document and they can begin typing. You can all work on the family history wherever there is internet access.
* **Finalization**: When everyone is done with their section, you make sure the formatting looks good and you now have a final family history. Everyone still has access to the family history and they can print and share the family history however they would like.

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## Section 2: Wikis

Wikis are free information websites containing articles about specific topics. Think of a wiki as an online collaborative encyclopedia. Genealogical researchers use wikis to find articles containing information useful for their research, such as location histories, biographical data about well-known individuals, research methodologies, information about archival collections, genealogical word lists, and so much more!

Wikis are created and maintained by volunteers. While one might wonder about the accuracy and reliability of information created by volunteers, wikis have become increasingly resilient, robust, and reliable. Different wikis will have distinct features, however they are very similar and the techniques to use one can often apply to using others.

There are several ways to find wiki articles:

* **Links:** Links connect one website or article in a wiki to other articles in the wiki. Every wiki page should contain multiple links to other wiki articles and to other websites. As you read an article, you can click on these links to learn more information.
* **Searches:**Searches retrieve and display related articles, based on the search terms used in the wiki search box or a search engine box. Wikis usually have basic search boxes or an option to use an advanced search feature. One example of a search engine is Google Search, more commonly referred to as simply .
* **Directories:**Directories are lists of links to online databases and other resources. They are often organized alphabetically or categorically. They may link to wiki articles, but they also link to other types of websites. One example of a directory dedicated to listing genealogical information is

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### Wiki Terminology

* **Wiki:**sites where users collaborate on the creation of all of the content.
* **Page Controls:** Links that toggle back and forth between the page view, the editing view, the discussion page about this page, or the history of the page.
* **Title:**The title of the page. In MediaWiki, the title of a page is also used to create the address. When a page is renamed, its web address is also changed.
* **Content:** The bulk of the information contained on a page.
* **Navigation box:**A box on a wiki page containing a list of links associated with the article.
* **Navigation bar:**A list of links that a user may need while viewing any page on the wiki.
* **Information boxes:** Typically a list of news and events relevant to the page. This is added using a template.
* **Categories:**A list located at the bottom of a wiki page, showing the categories to which an article belongs.
* **Talk:**Where users discuss articles in wiki. Every article has a talk page associated with it.
* **MediaWiki:** Advanced information and code that is used in the wiki.
* **Query Site:**A site where you can ask and answer questions about an ancestor, a surname or location.

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### FamilySearch Research Wiki

The  is hosted by FamilySearch. It is a wiki devoted to genealogical articles. Articles might be about research methodologies for specific world locations or they might be about research methodologies for specific situations, like DNA research, or articles might be about certain record types, or local research resources. Here is a link to an article about genealogical research methodologies for the .

To search the wiki, you can browse for articles using the clickable map feature or you can use the basic search, the advanced search, or the namespaces list options. The basic search feature will be sufficient for most of your needs.

A basic search can be performed from any search box and works best if you search for a location, a location and record type, or the title of the article you want to see. If you are looking for an article about a location, you may need to search for articles at different levels of government, such as state, county, city, or town. Also, you should not search for a full sentence or question.

An advanced search may be useful when you are searching for an image, help article, category, discussion page, user, or policy. The advanced search can incorporate the namespaces list by allowing you to narrow your search results by specific users, files, templates, etc.

In order for someone to edit the wiki, they must be assigned the role of editor and page creator. This is done by requesting to edit the wiki. Once the role has been assigned, the person will remain an editor and page creator as long as they follow the Wiki Guidelines and Policies.

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### RootsWeb Wiki

 is hosted by Ancestry. It is another wiki devoted to genealogical topics and contains articles similar in content to the FamilySearch Research Wiki. Here is a link to an article about the .

One unique feature about RootsWeb Wiki is that it hosts digital versions of two well-known reference books for U.S. genealogical research. Those books are the third edition of  edited by Alice Eichholz and the third edition of edited by Loretto Dennis Szucs and Sandra Hargreaves Luebking.

Another unique feature of RootsWeb Wiki is that it hosts  where you can ask other users about genealogical research questions. You can also answer user questions.

RootsWeb Wiki also has a basic and advanced search option. It also allows a search that narrows by multimedia, article, user, talk, file, etc. Click the magnifying glass in the search box with no topics entered. It will open a separate search page which then allows you to click on Advanced and then to choose options for narrowing search results.

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### Wikipedia

 is hosted by the Wikimedia Foundation. While not created specifically for family history, Wikipedia could also be used to search for historical information about a locality, which could give hints that would aid you in your research. For example, you might find that a certain county did not exist until a certain date, a courthouse was destroyed in a war, or an area experienced lots of growth during a particular time period. Here is a link to an article about , many of whom emigrated to new places all over the world to escape persecution; a researcher in Switzerland with Huguenot immigrant ancestors would find this very valuable.

Wikipedia hosts articles from many different languages. It has basic and advanced search capabilities and an option to search for topics located on a specific article, discussion, or general help area.

To see all search options, choose your chosen language and select the Search button while the box is empty of any search terms.

Now that you know a bit more about wikis, you might be interested in helping to add to or edit content on certain wikis. Genealogists can help build wikis by becoming wiki editors. Each wiki page will have a link to information about becoming a wiki editor and how to enter information accurately and within the parameters set by the wiki.

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## Section 3: Social Media

Social media comes in many varieties and helps to link people together. In the broadest sense, social media consists of any technology that allows you to create and share content with others.

Genealogical researchers use social media to connect and collaborate with other researchers, to share ideas or family history stories, ask questions, mentor other researchers, find long-lost relatives, provide information about research or specific locations, sell products, advertise, educate or teach, socialize, create events and send invitations, and much more.

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### Social Media Terminology

* **#:**Hashtag symbol used on Twitter to designate keywords or topics.
* **@:**"At" symbol used to mention another Twitter user or to reply to a Tweet.
* **Blog/Microblog:**A website where an author writes about their experiences or focuses on a specific topic. Microblogs have smaller entries.
* **Collaboration:**The ability of peers to interact collectively on projects, communication or other activities.
* **Direct Message:**A private message sent to or received from one of your followers (also known as DM).
* **Follow:**Subscribe to a social media feed or account.
* **Friend:**Someone you follow on a social media platform.
* **Group:**A place where Facebook users with something in common can interact with each other. These can be private or public.
* **Lists:**a grouping of other social media platforms users, which anyone can create, and then others can follow.
* **Page:**public profile specifically created for businesses, friends, causes, and other organizations.
* **RSS feed:**A feed of frequently updated content to which a user can subscribe. When the content is updated an RSS reader informs the subscriber who can then view the update (also known as Really Simple Syndication).
* **Social bookmarking:**a method for Internet users to create, organize, share, and comment on Internet bookmarks.
* **Social content website:**a website where users can upload, share, and comment on images, music, or videos (also known as a social media platform).
* **Social media:**online services where people can create and exchange content.
* **Social networking:**the use of online networks to create, maintain and establish relationships, share interests, and join groups and forums.

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### Meta or Facebook

, owned by Meta, is a free social networking site for users to share posts. Posts can contain text, photos, videos, live videos, links, polls, or video stories. Users can “friend” others, meaning they can see when others make a post and others can see their posts. Users can also change settings to make their user account public for anyone to see. Users can also set up groups or pages dedicated to specific topics or people. Some groups or pages can be used to connect school alumni, families, communities, selling groups, researchers, professionals, and more. Users can also upload and share documents and files. Users can add an emoji reaction to posts, reply to posts, or send private messages through the Messenger component. Users can also set up payment information to make purchases through Facebook. Facebook is one of the oldest social media sites. It can be accessed via computer, laptop, or smart device connected to the internet.

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### Storied

 is a new social networking site similar to Facebook and it was created entirely with genealogy and family history in mind. It offers both a free and a paid subscription. Users can build family trees, add images, attach historical records, create family groups, and share stories, photos, and memories. Users have their own profile and allow others access to it by adding other users, known as “connections.” One unique feature about Storied is that it has incorporated AI technology to help users easily auto-write family histories and memories by providing just a few details (note: always proofread and edit any AI-generated story). Storied can be accessed via computer/laptop or smart device connected to the internet.

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### X or Twitter

, now known as X, is a free social networking site for users to share posts (known as tweets). Posts were first restricted to 140 characters, but have since been updated to allow up to 4,000 characters (10,000 for Twitter Blue paid subscribers). Tweets can contain text, videos, photos, or links. Users post tweets to their profile and the tweets can be seen by those they allow (according to chosen settings). Users can accept “followers'' and request to become followers of other users. Twitter allows replies to tweets, as well as direct messages. Twitter can be used on a computer or laptop, but is more commonly used by a smart device connected to the internet.

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### Instagram

, once its own platform, is now owned by Meta/Facebook. Users have a profile and add posts, stories (videos or images that last only 24 hours, unless posting them as highlights on their profile), or reels (short videos) to their profiles. Users can approve followers to their profiles and request to follow other users. Posts can include text, images, video, links, audio, polls, sliders, interactive stickers, filters, and GIFs. Users can also post live videos. Users can like a post, reply to a post, or send DM messages. Some users become social media influencers and use their profiles to share products or generate income through partner and influencer contracts and/or advertising. Instagram is most often accessed via smart device, but can also be accessed from a computer or laptop.

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### LinkedIn

 is a social media platform dedicated to professional networking and it offers both a free and paid subscription account to users. Like on the other social media platforms, users on LinkedIn create posts, however these posts are more specifically about their chosen professional field and/or their job. Users can allow users access to what they share by accepting them as a “connection” and can ask to connect to other users. Businesses also create user accounts for users to follow. Users share text, images, links, or videos and can also search for jobs or post job descriptions. Users can interact with others by replying to posts, sending a private message, endorse other users’ skills and provide recommendations. The user profile can be used as an online resume, and include details about current work titles, education, work experience, skills, recommendations from other professionals, personal interests, and link to a digital version of the user’s resume. Recruiters hired by businesses to search for potential employees can also use LinkedIn to search for job candidates that fit certain job descriptions. LinkedIn can be accessed by a computer, laptop, or smart device.

These are only a few of the online collaborative tools useful to genealogists and as time advances, more will appear. There are other tools that some might consider labeling as collaborative tools. Some other ones to consider are podcasts, family trees, blogs, message boards, and forums.

##

## Section 4: Review

Read the self-evaluation questions below. If you do not know the answer, or if you answer "no" to a question, study the related reading and practice until you can write an answer or answer "yes" to each question.

1. What is cloud computing?
2. In what ways might a genealogist find cloud computing valuable?
3. What are the two types of cloud computing applications or programs?
4. What are two differentiating function types of cloud computing applications or programs?
5. What is the name of the cloud-based productivity application or program created by Microsoft?
6. What is the name of the cloud-based productivity application or program created by Google?
7. What is the name of the web-based productivity application or program created by Google?
8. Do you know how to create a document in the "cloud?"
9. Do you know how to upload a document to the "cloud?"
10. Do you know how to download a document from the "cloud?"
11. Do you know how to set sharing permissions for an item in the "cloud?"
12. If you were asked to create a shareable link to an item in the "cloud" that could be accessed by anyone with the link, without a password, could you do it?
13. Can you describe the purpose and importance of a backup?
14. Do you know the difference between sync backup options and storage backup options?
15. What should you consider when choosing a cloud computing application or program to use as a genealogist?
16. Can you describe what a wiki is and what it might contain?
17. If you were asked to find an article about a specific topic in a wiki, could you do it?
18. What are two wikis created specifically for genealogical topics?
19. Can you define social media?
20. What are some social media site or platforms?
21. What is a social media site or platform designed specifically for genealogical purposes?
22. Which social media platform is dedicated to professional networking activities?
23. If you wanted to follow someone on a social media platform, do you know how to do it?
24. Do you know how to send a private message to or accept a friend or connection request from another user?

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