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## PREFACE: The Standard We Strive For

Whiting-GLOBAL strives to achieve the Genealogical Proof Standard established by the Board for Certification of Genealogists.

“Proof is a fundamental concept in genealogy. In order to merit confidence, each conclusion about an ancestor must have sufficient credibility to be accepted as "proved." Acceptable conclusions, therefore, meet the Genealogical Proof Standard (GPS). The GPS consists of five elements:

1. reasonably exhaustive research;
2. complete, accurate citations to the source or sources of each information item;
3. tests—through processes of analysis and correlation—of all sources, information items, and evidence;
4. resolution of conflicts among evidence items; and a soundly reasoned, coherently written conclusion.
5. "Reasonably exhaustive research" is further defined as follows:
  - a. Assumes examination of a wide range of high quality sources
  - b. Minimizes the probability that undiscovered evidence will overturn a too-hasty conclusion”<sup>1</sup>

This Research Handbook<sup>2</sup> describes the Whiting-GLOBAL approach to meeting these criteria.

## **BATCH (TREE) DEFINITION**

The Whiting-GLOBAL genealogical data is divided into several files, referred to as Batches (or Trees). Each file covers a separate geographical area. This allows researchers to work on their own file, minimizing the need for coordination between researchers. The results of this research can be viewed as individual Batches or as one combined whole on the Whiting-GLOBAL website ([www.whiting-global.org](http://www.whiting-global.org)). For example, [this map](#) shows how England is divided in to Batches.

## **BUBBLES**

### ***Definition***

Within a batch, people are grouped into “bubbles.” A bubble includes all individuals who are directly related to one other. At the top is the oldest ancestor, followed by all of his/her descendants, down to approximately 1900. Eventually, every person in a batch will be included in a bubble. Hopefully, linkages will eventually be found to connect the bubbles together - creating one or more large bubbles.

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<sup>1</sup> From the Jan 1, 2017 issue of Genealogy’s Star, a blog written by James Tanner (access it at <http://genealogysstar.blogspot.com/>).

<sup>2</sup> Note: The field of genealogy is currently evolving very rapidly. In response, this handbook is not a rigid, fixed document, but is somewhat fluid as we adapt to the latest capabilities available. Some sections are still in edit mode and others will change as needed to accommodate new capabilities in the industry.

## ***People to include in a bubble (and Tag definitions)***

Only people who exist. Only include people in our file when we have adequate records to document their existence. Identify these supporting records/sources in the person's notes.

- Top of the bubble. This is the oldest person (or couple) in the bubble. All that is required for them to be designated "Top of Bubble" is adequate documentation to show that they existed and are the parents of the others in the bubble.
  - Everyone else in the bubble is a descendant of this person (couple) or is included through marriage to a descendant.
  - Assign a **YELLOW Tag (#2)** to both the husband and the wife at the top of each bubble. Children may be sealed to these parents.
- Bottom of the bubble. Do not include anyone in a bubble if either spouse has a birth date less than 110 years ago (the 110 rule).
  - Only document their birth. Do not document anything else, including their children. Research will be completed on these people later.
  - Assign a **BLUE Tag (#3)** to this couple. The BLUE Tag indicates that research can continue with this person sometime in the future.
- Whiting spouses and all descendants. When someone marries a Whiting, complete the documentation on them and their posterity even if they have a different surname (as if they were Whitings). Document ALL of their descendants down to 110 years ago (the 110 rule).
- Sides of the bubble: Extended family of spouses. Assign a **BLACK Tag (#4)** to the following *IF* an AQ record is created for them. The BLACK Tag indicates that we have *not done in-depth research on them*, and without in depth research *we do not do their temple work*.
  - Parents of the spouse. If the parents are known, set them up as individuals in AQ and document their existence in the standard way (not in depth), but do not document their parents or siblings.
  - Siblings of the spouse. Only if siblings are necessary to help identify and prove who the parents are, set them up as individuals in AQ and document them in the standard way (not in depth).
- Completed work. Assign a **GREEN Tag (#5)** to everyone in the bubble when their documentation is complete and they are ready for temple work. A person may have more than one tag. For example, in addition to either #2, #3 or #4, they may also have all of these: #5, #6, and #7.
- Moved to Family Search. This will share our work on the largest public genealogy website. Assign a **PINK Tag (#6)** when this person's record is moved to Family Search for others to view.
- Finally Finished. Assign a **GRAY Tag (#7)** when this person's record is finally finished and has been moved to the temple file, waiting for temple work to be completed.

### ***Bubble Tag definitions***

--Individuals with unfinished Research--

- **#2, YELLOW: Top of the bubble. They exist, but have incomplete research.**
- **#3, BLUE: Bottom of the bubble. A Whiting/spouse, but research stopped because of the 110 Year Rule.**
- **#4, BLACK: Extended family of a Spouse. Do not research these people.**

--COMPLETED Research--

- **#5, GREEN: this person is adequately completed.**

--Moved to FS for the public to view--

- **#6, PINK: create Sources, move to Family Search.**
- **#7, Gray: Reserved or already completed.**

#### ***NOTES:***

1. A person whose research is completed can only have 3 tags: #5, #6, and #7.
2. Tag #1, is for future use, or is used to Tag individuals with problems.



## PROCESSES

### AQ - Ancestral Quest

#### ***Begin a new Bubble***

Whiting-GLOBAL uses a geographic-centric research strategy, which is to identify a specific parish in England and to complete the documentation of every Whiting in that parish before moving on to another parish. So Bubbles continue to be created from Whitings in that parish until every Whiting in that parish is included in a Bubble. At that point, the next Bubble will be chosen from an adjacent parish, which will be the focus until all of the Whitings in that parish are documented, etc.

#### How to begin the Bubble

- Go to Ancestry.com and do a General Search for the surname WHITING and the name of the parish as birthplace.
  - Print the generated list.
  - Extract all Whitings from this list into AQ, but DO NOT create any duplicates (use the portal).
  - Continue the documentation of their family with Find My Past and Family Search posting the results with URL into notes of each person mentioned in a document.
- This will lead to extension of the bubble

#### ***Add a new person***

*Before adding anyone to AQ you must first check to see if they already exist in an AQ Batch.* Open the Whiting-GLOBAL Portal and use one of the search capabilities to search for the new person.

- If you cannot find the new person in the Portal, **you may add the person to AQ.**
- If the person matches anyone in the Portal, look the far right of the matching person's name to see which Batch they are in.
  - If the matching person is in the Batch you are working on, use this person instead of adding a new person. Do the following:
    - In AQ, open Family View for the family where the new person is to be added to, click on **Add Child (or Add Father or Mother)**.
    - In the window that pops up, click on **Search for Existing Child** (or Father or Mother).
    - Find and click on the matching person, then OK. They are now linked to the family.
  - If the person is in a different Batch than the one you are working on:
    - DO NOT ADD – refer this to MARK. MARK: to resolve this, import the person and the Bubble they are in (if any) from the other batch. Then link the person as described above. This action will also link the two bubbles (current and imported), creating a new, larger Bubble.

#### ***Find/fix duplicates***

If you find any duplicates, go to the Whiting-GLOBAL Portal home page, scroll to the bottom of the page, and click on the person's surname in the Alphabetical List.

- Find the person on the List of People that appears. If it is a duplicate, the name should appear more than once. Look the far right of the duplicate persons names to see which Batch they are in.
  - If the duplicate names are in your Batch, merge them using the AQ merge capability.
  - If one of the names is in a different Batch, REFER TO MARK to handle.

- **MARK INSTRUCTIONS:** If a Bubble overlaps with a Bubble in a different Batch, combine the two Bubbles by moving all of the people (probably those in the smaller Bubble) to the other Batch, and then linking the Bubbles together by merging the duplicate person.

### ***Document an Individual***

Enter NOTES for an individual.

- Enter **all available Notes** for each Individual (including relevant Notes from Siblings).
- List the NOTES in **chronological order** (by Year Date) from earliest to latest.
- Entering a NOTE:

- **Top of the NOTE:**

- **Equal Signs.** Put 8 equal signs “=” at the top of the NOTE, as shown on the right,
- **Year Date.** Go to the next line and enter the Year Date for each source document (eg, “1825”).

- **Transcription.** Paste the transcription of the source document under the Year Date.
- **Source Citation.** On the line below the transcription, type “+++++” and move to the next line and enter the Source Citation. In most cases, the citation will already be there.
- **Transcription URL.** Skip a line and paste the Computer Friendly URL of the transcription below that.
- **Actual Image & URL.** If an Actual Image is available, skip another line, type “Actual Image: ” and then on the next line paste the URL to the Actual Image.
- **Double Space.** Follow each NOTE with 2 vertical spaces.

#### ***Example NOTE Format***

(Previous NOTE)

```
=====
1825
(Transcription ... ..)
+++++
(Source Citation ... ..)

(Transcription URL ... ..)

Actual Image: (Actual Image
URL ... ..)
```

```
=====
1841
(next NOTE, etc.)
```

### ***Finalize an individual and assign a GREEN Tag.***

Complete the following steps to Finalize an individual

Audit the individual for completeness.

*A person is not complete until all of the following questions have been answered correctly.*

- **All Available Notes:** Have all available Notes been included for this person (including relevant Notes from Siblings)?
- **Citations.** Do all Notes for this person contain a Citation documenting where we got the data?
- **Extended?** Can the research be extended any further back or down from this individual?
- **The “Smell Test.”** Does everything about this person make sense, is it logical, does it feel right, do the geographical locations support the conclusions reached for this individual?

Create Source(s)???

Assign a GREEN Tag.

When the Bubble is completed. When you are confident the required research on everyone in this bubble has been accurately completed, Notify Mark to audit the Bubble. He will identify the next Bubble to work on.

### **MARK: Finalize a Bubble**

Transfer responsibility for this Bubble to Audit. The researcher who created the bubble is transferred to a different Batch while the audit is being performed.

#### Audit the Bubble.

- Remove all tags for all persons in the Bubble.
- Select a person to audit and go to Family View.
- Check all documentation for that person. When all corrections have been made, apply the appropriate tags (including the GREEN tag if appropriate). Consider all of the following:
  - Have all available Notes been included for this person? (including relevant Notes from Siblings)?
  - Have efforts been made to document birth, christening, marriage, parents, children, death and probate for this person?
  - Is there a Source in every Note that documents where we got the data?
- Can the research be extended any further down or back on this individual?
- Use the AQ **NAME LIST** to keep track of your progress by viewing people who have not yet been tagged.
  - All new people discovered and added as a result of this audit must have their documentation completed and be tagged before the audit is completed.
- When the audit of a person has been completed, select another person and repeat the above procedures. When all persons in the Bubble have been audited and have received the appropriate tags, begin the transfer of sources.

#### Source and move people to the temple file.

- Create sources for each person in the Bubble as described below, transfer them to FAMILY SEARCH, and give them a PINK tag (#6).
- When all GREEN tag people have been transferred to FAMILY SEARCH, submit them to Carvel's Temple work File and assign a GRAY tag (#7)

### **CREATING SOURCES: TO BE CONSIDERED LATER:**

Create one or more Sources for this individual.

#### Select and copy a Note

- Open the **Individual Edit page** for this person, open his/her Notes, select the note to be copied (highlight from the top of the note all the way down to the bottom of the note ... in most cases this will be to the equal sign line), and **COPY THE NOTE**. Close the Notes.

#### **1. Identify the Source Type.**

- Click on the "S" button to the right of the Birth Date and Place (the "S" stands for SOURCE). The **Source Citation ... page** will open and a list of categories will appear in a box on the right side of the page.
  - If this Note documents a death or burial, click on the "S" to the right of the Death or Burial and continue with the following procedure.
- Choose the correct source type from the box (i.e. If the Note you are creating a source for is a census record, choose the category: Census). Go to the bottom of the template and click on the ADD or ADD NEW Button, whichever appears. The **Create Source page** will appear.

#### **2. Create the Source**

- Go to the Actual Text Of Source Box in the middle of the page and paste the Note in that box. The box is small, so the entire Note will not be displayed. Use the up arrow to scroll to the top of this Note.
  - Make sure that the Year of the document for this Note is in the top left corner of the box. If not, type it in.
  - Copy the top 2 or 3 lines from this box and paste them into Title Box at the top of the page.
    - The top 2-3 lines should identify the person and the date and title of the source document.
  - Add the person's relations. In the Title Box, immediately after the person's name, type "son of (name)" or "daughter of (name)" or "wife or husband of (name)."
  - If the Short Title Box did not automatically fill in, click in the box to cause it to happen. Click the OK button in the lower left corner of the page.
2. Attach the Source to the person
    - The **Source Citation page** will automatically open. Click on the SELECT BUTTON to attach this Source to the person. When the next page appears, click the OK button in the lower left corner of the page.
    - You are automatically returned to the **Edit Individual page** ... and there should now be an asterisk (\*) by the "S" on the line you just documented.
  3. If there are more Notes, go to Step 1 above to create sources for all of the other Notes in this person's individual record.
  4. Close the **Edit Individual page**.

## Family Search/Family Tree

### ***Moving individuals to Family Search***

When an individual is completed (GREEN Tag, #5) they are ready to be moved to Family Search (Family Tree). Follow this process to copy them over for others to see online.

#### Transfer Sources to Family Search

1. Click on the blue *TREE OF LIFE* icon located in the NAME BOX
  - The **Review and Selectively Synchronize FS Person with Local Individual page** will appear. On the left side is AQ information, on the right side is FS information. The left side shows information you have for this Individual. The right side shows information from FS.
2. Click on the SOURCES BUTTON at the bottom of the page. The **Review/Synchronize Sources for (name) page** will appear, with your sources on the left.
3. Check the box to the left of a source title and it will open the **Family Tree Facts to be Tagged with this Source template**. Check the boxes that apply to this document, and click Add Source.
4. The **Reason to Attach Source page** will appear. In the box, give a brief description of the items this particular source substantiates (eg: birth, marriage, birth and family relationships etc.). Click ATTACH. Your source will now be transferred to FS.
5. The **Review/Synchronize Sources for (name) page** opens again, with the Source now also on the FS side of the page. Click CLOSE.
6. If there are more sources, repeat the process, otherwise, click SAVE.

### ***Reserving names for temple work***



1. Link the person to FS.
  - If their *TREE OF LIFE* on the **Family View** is Blue, they are already linked.
  - If it is White, click on the White *TREE OF LIFE*, sign in if needed. Three possibilities exist:
    - 1) A list of possible matches appears. Look to see if there one of these matches the person. If it does, select that match and click LINK at the bottom of the form, then PROCEED.
    - 2) No match appears in the box. Click ADD TO FAMILYSEARCH at the bottom of the form, then click PROCEED to connect the person to FS. When the **Select standardized place name** form comes up, if the place names match, click SELECT, otherwise, mark the box Place not in list. Then click SELECT.
    - 3) You receive this message: “There is not enough information in the record for \_\_\_(the person)\_\_\_ to process a standard match on FS. Switching to Search.” Click OK. Then click SEARCH in the form that appears. This takes you to 1) or 2) above to repeat the procedure.
2. Right click on the person’s name in **Family View**, then click on VIEW ON FAMILYSEARCH.ORG.
3. Click on the ORDINANCES Tab (to the right of Details) under the person’s name (the icon of a white temple on a green background). You will see ordinances that can be requested.
4. Click on the REQUEST ORDINANCES button (blue), then Click on the REQUEST button (blue).
5. Check the box at the bottom left (“I have read and will comply ...”)
6. Click Add to TEMPLE ORDINANCE LIST (blue). The name is put into the file of the person whose Username and Password was used to transfer you from AQ to family search. *At this time, it is Carvel’s Username and Password.*
7. DO NOT PRINT OR SHARE THESE ORDINANCES! Authorization is controlled centrally. If you want to perform any, please email [carvelwhiting@gmail.com](mailto:carvelwhiting@gmail.com). You will receive the cards from him.
  - This is done to ensure that all ordinances are completed in a timely manner and none are lost or forgotten.

### ***Temple file: Request Release (to you) of names “Shared with the Temple” by someone else***

2017-12-21. If another patron reserved any ordinances for someone and then released those names to the temple to be completed, AND if you have also reserved some of that person’s ordinances (and that person is, as a result, on your reserved list), you can ask the temple to RELEASE those NAMES to you to be completed. The required steps are documented in this FS Document:

- <https://www.familysearch.org/ask/salesforce/viewArticle?urlname=Ordinances-have-been-reserved-by-a-patron-for-a-long-time-1381815195905&lang=en>

### ***Family Tree: Upload GEDCOM file***

2016-09-28. How to upload a GEDCOM file to Family Tree. It is unlikely that this function will be used.

1. Sign in to Family Tree
2. Select SEARCH (this is how you can see the FamilySearch DB, instead of the Family Tree DB)
3. Select GENEALOGIES
4. Go to the bottom of the page, click on SUBMIT TREE
5. It will allow you to upload a GEDCOM file, and to manage that upload as well as previous uploads

### ***Family Tree: Synchronize with AQ***

2016-09-28. Note: this must be done from within AQ. This function has not been tested.

1. Open a file in AQ (if collaboration file, it must be checked out)
2. From the menu at the top, select FamilySearch
3. Then select Link/Upload Groups
4. Select no more than 100 people that you want to synchronize with FamilySearch (a large group of people will take too much time)
5. Press START MATCHING, then wait for it to complete the matching.
6. Then VIEW and synchronize the Matches, one at a time
7. When finished, CLOSE

## **POLICY DECISIONS**

### ***Include Spousal Lines - or NOT?***

**2016** July. In ENGLAND: No NOT include spousal lines in our research (do not include the parents/ancestors or siblings of those who marry into the Whiting lines. Mark them with a BLACK tag.

**2016-09-29.** Gary Tree vs USA Tree: For now, we will retain the spousal lines as we merge the Gary file with the USA Tree.

## **OTHER RESOURCES**

From Paul Hyer, 2016-09-28

- Virtual Pedigree (google to find it)
- Relative Finder
- Puzzilla.org

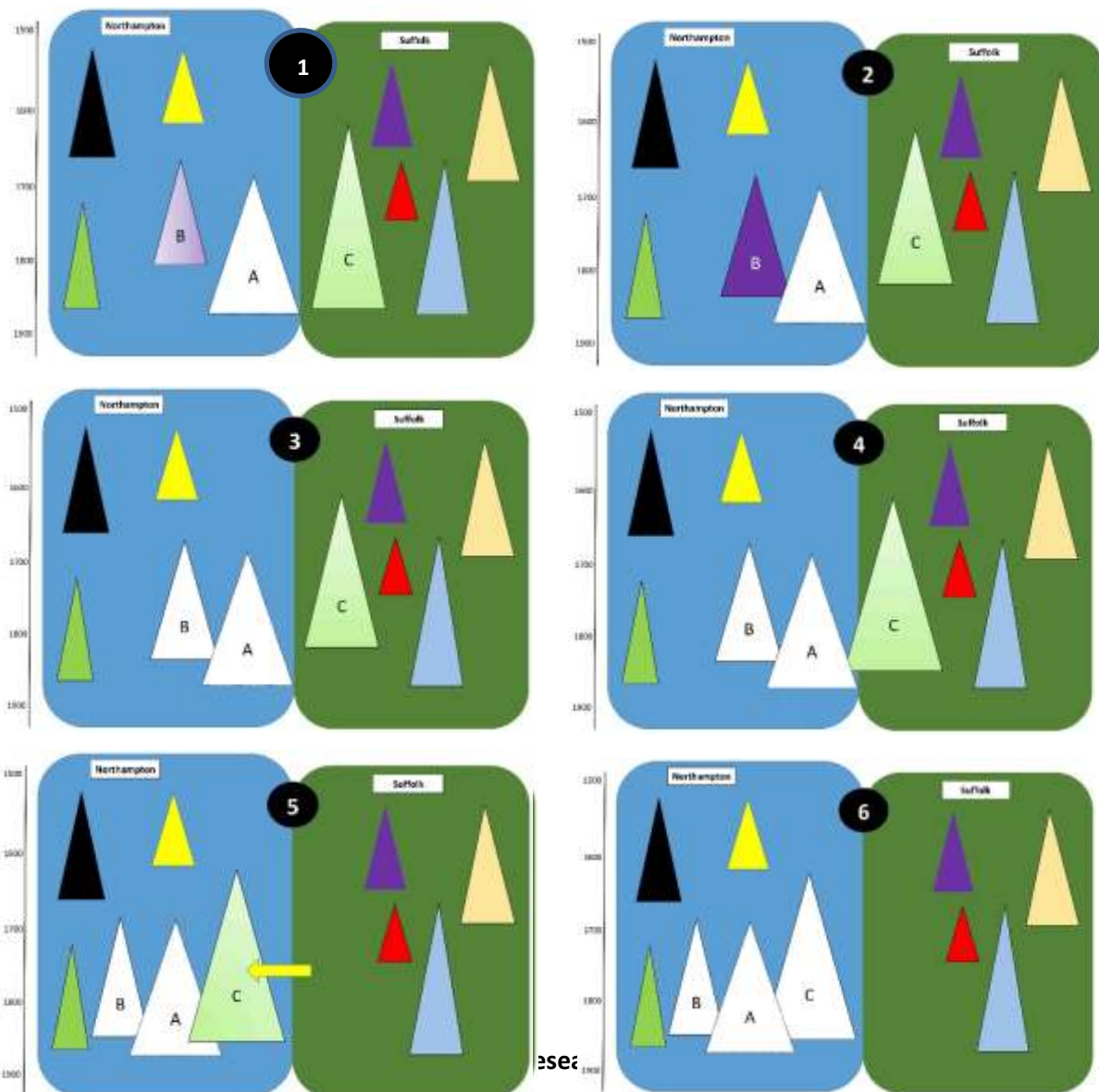
## ATTACHMENTS

### ***Attachment 1: How Batches and Bubbles work together***

The diagrams below show how Batches and Bubbles interact, and how Bubbles grow and are combined until they eventually become one great Bubble (our ultimate goal). This example uses only two Batches (Northampton and Suffolk) and 10 Bubbles. Each Bubble is a triangle, with the oldest ancestor at the top and posterity spreading out below. Bubbles A, B, and C are identified below to show how this works.

Diagram 1 is the beginning state. Bubble A is a full, completed Bubble, and research is being done on Bubble B. In Diagram 2, Bubble B grew until it overlapped Bubble A, which happened when adding a new person in B duplicated a person already in A. But instead of duplicating the person, the Bubbles are merged (connected) at that person, creating the larger combined Bubble AB shown in Diagram 3.

Meanwhile (in Diagram 4) Bubble C in the Suffolk Batch has grown until it overlaps Bubble AB in the Northampton Batch and they need to be merged so as to not create a duplicate person. To do this, Bubble C is moved to the Northampton Batch (Diagram 5) so that C and AB can be merged in the same way that A and B were merged earlier. The final result is shown in Diagram 6. We now have one large, combined Bubble ABC.



## ***Attachment 2: AQ Bubble Reports***

### ***Bubble Report-STANDARD***

3. Set the report to LANDSCAPE
4. Columns
  - Tags (8 characters wide)
  - RIN (7 char wide)
  - Surname,Given (25 char wide)
  - Birth Date (15 char wide)
  - Birth Place (30 char wide)
  - Notes, all (20 char wide)
  - FSPID (14 char wide)
  - LDS Ordinance Codes (8 char wide)
5. Sort order:
  - Surname,Given: Ascending, Large to Small
  - Birth Date: Ascending, Large to Small
6. Save the report with this name: **Bubble Report**

### ***Bubble COMBO Report***

- Set the report to LANDSCAPE
7. Columns
    - Tag#2 (5 char)
    - Tag#6 (5char)
    - All remaining columns the same as the STANDARD Bubble Report
  - Sort Order
    - Tag#2: Descending, Large to Small
    - Tag#6: Descending, Large to Small
    - Surname,Given: Ascending, Large to Small
  8. Save as: **Bubble COMBO Report**