

Getting Organized: Research, Files, Findings

Class 2: Organizing Your Files

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For genealogists, the word organization is almost akin to a dirty word. We shudder at the very thought of having to organize all those papers and files. And why is that? After all, once they are organized, we will save valuable time. No longer will it be necessary to search three or four different places for a given document. You will have scanned images at your fingertips.

Organizing All That Research

If a genealogist is to continue to push back the walls of uncertainty in their family research, they will need to organize their research methods. It is only by knowing where a researcher has been and where they need to go that the research progresses. Otherwise, the researcher may end up wasting a lot of time repeating past research.

Research Logs

Research logs or research calendars are an excellent way to keep track of the research you have already accomplished. Most of these logs have places for the following:

- *Date of research*: Using the standard accepted DD-MMM-YYYY format leaves nothing to chance.
- *Repository*: This can become an essential piece of information.
- *Call number*: Since most of our resources are cataloged in libraries, the call number saves you time when you need to return to that source.
- *Description of source*: Be as thorough with your description as possible; full source citation
- *Comments or results*: This is where you will record the positive or negative evidence.
- *Document number*: Most research logs allow for a document number. You may not use it.
- *Miscellaneous fields*: In addition to the above, some research calendars offer additional fields, such as search objective, time period, locality, jurisdiction, and surnames.

Preparing for Future Research

It is a given in genealogical research that once you answer one question you will have at least four or five new questions to answer. The trick is to record the questions at the time they come up. This can be done in a number of ways.

- *Genealogical software programs*: There are a number of programs on the market that will allow researchers to include free-form text. This is an excellent way to record questions as you enter information about a person.

- *Other software programs:* In addition to genealogy software programs, researchers can develop their own question file in any of the many database or notebook programs on the market. It is a good idea to include fields for the date of the question, the question, the results, and the date the answer was discovered.
- *A notebook:* Even if you do not have a computer, it is possible to develop a similar setup using a simple notebook. I suggest using a three-ring binder so that the pages can be organized in some way (I recommend alphabetically). Include on each page the individual's name, the date of the research, the date and place of the event that sparked the question, the question itself, and room for the date and information that answers the question.
- *Online:* Online sites such as Research Ties <<https://researchties.com>> offer access to your family tree and research to-do list anywhere you have access to the Internet. AmericanAncestors.org's AnceTrees also offers a research log.

Keeping Track of Families

Of course, the family group sheet is the most-used form for keeping track of families, but there are a number of ways these sheets can be organized. The important point here is to make the system one that will be followed so the family can be found quickly and easily.

- *Alphabetical order:* Placing the sheets in three-ring binders in alphabetical order eliminates a lot of guessing when looking for a person, as long they are the head of a family somewhere.
- *Modified ahnentafel number:* The ahnentafel numbering system makes it easy to locate an individual's parents. The number of the father of a person is found by multiplying their number by two. The number of the mother of that same person is found by multiplying by two and adding one.
- *Pedigree chart number:* Since most researchers concentrate on the families on their pedigree charts, a system can be devised where the chart number and the location number are used and the family group sheets are arranged in ascending order.

Organizing All That Paper

Any genealogist quickly discovers that the amount of paper they have to track multiplies exponentially to the number of ancestors on their tree. Offices have been known to be overrun by piles of paper. If you start out with a filing system, and maintain it, you will find that you are in control of all that paper, instead of the other way around.

Notebook system

Perhaps the best example of this filing system can be found in William Dollarhide's *Managing a Genealogical Project* (Baltimore: Genealogical Publishing Co., Inc., 1988, repr. 1999). By adhering to a few simple rules, all the papers and notes that make up a researcher's files can be conveniently stored in three-ring binders. **Rules:**

- Control the size of the paper. If using three-ring binders, then use only 8.5" by 11".
- Separate sheets by surname.
- Within the surname sheets, separate by the place.
- Assign each page in the binder a page number.

Surname folder system

This system relies on the creation of folders for each surname of a person. However, in order to keep track of everything in it, some sort of order is needed.

- *Document number*: Using consecutive numbers and some sort of an index sheet, a number is assigned to each piece of information in the folder, and then is recorded on the index sheet with details about that page.
- *Locality/page number*: Borrowing from the Dollarhide system, file folders are used instead of three-ring binders but still retain the numbering of the pages.

Surname/type of record folder system

This system, developed by Sharon Carmack and illustrated completely in her book *Organizing Your Family History Search* (Blue Ash: Betterway Books, 1999), uses a file folder for each surname on the pedigree chart. These file folders are then filed alphabetically. This system relies on a couple of research sheets used in conjunction with the folders.

- *The note-taking form*: This sheet has spaces for the following information: surname, type of record, title of source, publication facts, call number, repository, and for recording the information found.
- *Table of contents*: This sheet is placed at the front of the file folder and includes lines for the following information on each document in the folder: enclosure number, date, listing of search, repository/address, source citation, results, date received, and money sent.

Family folder system

This system creates a file folder for each couple on the pedigree chart. The file folder is under the name of the husband. These are then filed alphabetically. This system works best when a couple of research sheets are used in conjunction with the folders.

- *Research planning sheet*: This sheet has spaces for the following information: ancestor name, locality, source, call number, researcher, date of search, and repository, along with defining the problem.
- *Research inventory sheet*: This sheet is placed at the front of the file folder and includes lines for the following information on each document in the folder: date or letter of search, place of search/addressee, summary – information found/purpose of search, date received, and document number.

Organizing All That Computer Information

Computers are a modern marvel. There are now all sorts of creative ways to misplace valuable genealogical information. Just as you need to have control of your paper files, it is essential that you also have control of your computer files.

Family stories

Family stories are what make family history research more than dry names, dates, and places. However, keeping track of these on the computer can sometimes be cumbersome.

- *Word processing program*: This is probably the most common way to record and preserve family stories.
- *Genealogy program*: Some of the currently available software programs offer this capability.

Databases

Most researchers hear the word database and immediately think of their database of ancestors. However, there are a number of other utilities that can help the genealogist maintain and manipulate their data. A few are listed here:

- *Census database program*: Offers the ability to extract and record information from the census in a computerized format.
- *Cemetery database program*: Offers the ability to record information found on tombstones and at cemeteries.
- *General programs*: This can be the best option as it allows for the creation of documents for different types of records but keeps them all together. One such program designed specifically for genealogists is Ancestor Detective's Clooz. (<http://www.clooz.com/>).
- *Images*: Many genealogists now own scanners and are scanning family photographs for use in their genealogy programs. It is important to set up an indexing system to save you from having to open each image to see what it is. This can be accomplished either on paper or in the computer using a basic spreadsheet to record the name of the file, and other pertinent information to identify the image.
- *Internet*: Genealogists collect everything, so it is not surprising that they are now out there collecting URLs (computer-ese for Internet addresses) for their favorite genealogical websites. The problem? Genealogists love all websites that have anything to do with genealogy and their list of favorites quickly becomes unwieldy. For easy reference, set up a simple spreadsheet that lists the URL, the name of the website, and a

description of what the website contains. This way the next time you want to visit a website, you can quickly find the URL, cut and paste to your browser, and you are off and surfing.

Database and Notebook Options

Most researchers hear the word database and immediately think of their database of ancestors. However, there are a number of other utilities that can help the genealogist maintain and manipulate their data. A few are listed here:

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- *Scanned photos:* Many genealogists now own scanners and are scanning family photographs for use in their genealogy programs. It is important to set up an indexing system to save you from having to open each image to see what it is. This can be accomplished either on paper or in the computer using a basic spreadsheet to record the name of the file, and other pertinent information to identify the image.
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- *Notebook software:* Offers family historians another way to track not only their research but things they find online and also perhaps put notes of questions and theories along with the records found or data extracted from a book, records or website.
- *Tablet apps:* Tablet apps such as GoodNotes and Notability offer methods of carrying your research with you. With the ability to insert PDF files and images and write on them, you have an electronic notebook at your fingertips.

Tip: A spiral bound notebook can be just as good as fancy notebook software for some projects.

Organizing Files on Computer

In today's digital world, it is not surprising to find that you are visiting repositories and bringing home scanned images instead of folders of paper. Of course, keeping all those images straight so that you can find what you need later, just as it is important to find the piece of paper in your paper files. Some decisions on how to arrange these images will be determined by the focus of the work that was done. Were you working on your family history? Was it a special pet project? Are the images more focused on the historical aspects of a subject or locality? All of these things need to be taken into consideration when trying to decide how to arrange the digital documents.

The biggest collection of digital documents will most likely fall into the "family history" category. So you may want to give thought to the following:

- Consider using the same system with your digital files as you do with your paper files
- May want to have this system set up before going on any major repository visit that could result in lots of images
- At least name files so that you can recognize what the image is when you get home

Tip: Save research logs in the family files or create an actual folder on your computer for them.

Combining Paper and Digital

Many researchers began tracing their family history before the internet and definitely before you could digitize images from microfilm. As such there may already be a lot of paper files. It's a good idea to consider combining the two of them so that you always have everything whether you are working at home in your paper files or on the road and want to check something.

- Take digital photos of your paper files and put them in the appropriate computer folder
- Rename the images of the documents from the physical folder to coincide with the index/inventory sheet in your folder of papers
- Do this whenever you work on a family for which you have physical copies in a folder.

Tip: Digitize your paper files and print your digital files.

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