

Building Your Genealogical Skills

Part 2: Research

Module 5 – Organizing for Family Historians

Overview

Rule number 1 for organization is to use a system you can maintain—there is no one “right” way to organize—everyone’s brain is different. Consistency is the key and is leaving a paper trail. Using standard forms simplifies your task.

Think of organizing as four different types of tasks:

- Organizing your research process
- Organizing your findings
- Organizing your files
- Organizing your written summary

Organizing the Research Process

Use the Tools/Forms!

- Research plan
- Research log

Use a paper or digital notebook to keep track of questions that arise. Use to-do lists to help you remember what you wanted to do with the piece of information you just found.

Some genealogists find a note-taking software to be helpful:

- Evernote
- OneNote

Organizing Your Findings

The key tools include:

- Pedigree chart
- Family Group Sheet

Organizing Your Files

Software is a tool—not a crutch! Beware the temptation to let the software do your thinking for you!

Organizing Digital Materials

File Naming

The naming system for your files should be easy to remember. For electronic files, a simple mnemonic may work well: who, what, where, when. Start with the name of the person, surname first, followed by the given name, e.g., Hummer-Jacob or HummerJacob for fewer keystrokes. Sometimes you will add a birth year to distinguish people of the same name.

Next, add a short descriptor for the type of document, e.g., will, land, census, church. Keep a list of the descriptors you use so you don't inadvertently add new ones when you don't need to. Third, add a location for the record, followed by a year. For Jacob Hummer's will the file name would be: HummerJacob-will-FrederickMD-1777.

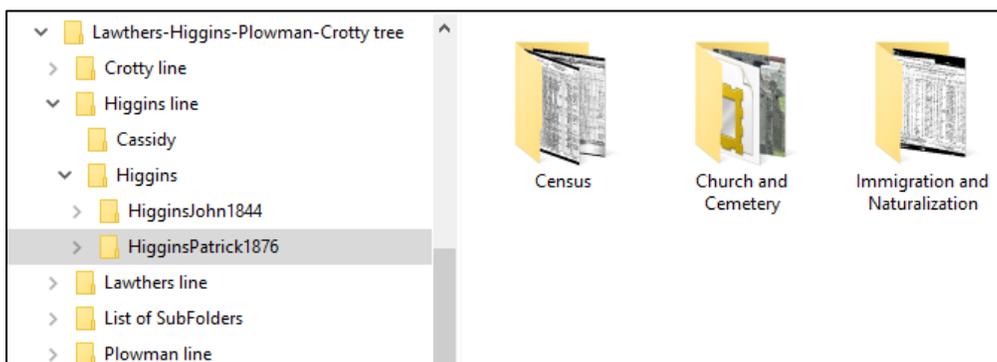
Table 1: Sample File Names

HummerJacob-deed-EmmitsburgMD-1810
LawthersNancy-gravemarker-GreenvillePA-2022
HomerFred-Will-p1-Cleveland-1903
HigginsJohn1844-death-ModorraHIRE-1925
CrottyJames-census-EastchesterNY-1900

Folder Structure

Files reside in folders. Your folder naming system is also important. Typically, you will organize your folders into surname groups. At the top level you will have a folder with a name such as "Genealogy Files" or perhaps the name of your family tree. Under that your folders may be the four major surnames for your family, e.g., Lawthers, Plowman, Higgins, Crotty. Within each major branch there will be a surname folder for the surnames you have researched.

Table 2: Sample Folder Structure



The next level will be folders with types of records. The folder "list of subfolders" contains a master list of empty folders by record type, e.g., vital records, military, etc. In the example above, Patrick Higgins, born 1876 has census, cemetery, and immigration records. Record type folders may include:

- Vitals
- Census
- Church and Cemetery
- Immigration and Citizenship
- Military
- Land
- Probate
- Newspaper

Hard Copy Naming System:

Hard copy documents are often filed in folders by couple. A child's record typically resides in the parents' folder until the children marries or establishes their own household. Records from this point forward are filed in the child's household folder.

Organizing Your Summary

Genealogical Sketch

The genealogical sketch is a compact way of summarizing your findings in a way that makes it easy to pass the information to your family and others. A sketch typically covers one person and their spouse and has three parts: beginning, middle, and end. The beginning includes all vital information about a couple in the following order:

- Place of birth/baptism and birth/baptism date(s)
- Place of death/burial and death/burial date(s)
- Place of marriage and marriage date

The middle portion of a genealogical sketch is whatever biographical information you wish to include. The ending section lists the couple's children and their dates. People are numbered.

Genealogical Numbering Systems

There are three principal numbering systems used in genealogical works. Most compiled genealogies use one of these three systems: Ahnentafel, Register, or NGSQ.

Ahnentafel

The Ahnentafel, or ancestor table, system works backwards from the present. The multi-generational chart or pedigree embodies this system.

Figure 1: Ahnentafel Numbering System¹

12. LEMUEL ASHLEY DECATUR PAYNE was born in North Carolina 29 January 1844 and died at Austin, Travis County, Texas 21 September 1911. He married ca. 1869, ²⁰
13. NANCY DIALTHA BLANTON, who was born in Monroe County, Tennessee 29 December 1846 and died at Austin 5 May 1913. ²¹
14. JAMES CRAWFORD McMILLAN was born in Missouri 12 February 1828 and died in Karnes County, Texas 31 August 1907. He married in Hill County, Texas 24 November 1864, ²²
15. AGNES INCE, who was born in Missouri in 1845 and died at Arlington, Tarrant County, Texas before 23 November 1916. ²³

¹ Rhonda R. McClure, *Ancestors of Bob Schieffer* (Boston, NEHGS, 2016) p. 11

Register System

The Register numbering system descends from an ancestor and assigns numbers to individuals who have separate biographical sketches.

Figure 2: Register Numbering System²

Genealogical Summary

1. HENRY¹ DISPAW/DESPER was born say 1618 (assuming marriage at 25), and died in Lynn, Massachusetts, in October 1676.^[10] He married in Horsemonden, Kent, 10 April 1643, **HELEN JARRET**, who died probably prior to 1673 when her husband and son Henry, both potters, immigrated to Massachusetts.

Henry Dispaw left a will dated 27 February 1674[/5?], proved 26 June 1677, mentioning sons Henry and Edward. The other children, whose baptisms are shown below, evidently died or remained in England.

Children of Henry¹ and Helen (Jarret) Dispaw/Desper, all baptisms in Horsemonden:

2. i. HENRY² DISPAW, b. ca. 1644; m. (1) _____; (2) CATHERINE _____.
- ii. JOAN DISPAW, bp. 13 Sept. 1646.
3. iii. EDWARD DISPAW, bp. 24 March 1649/50; m. SARAH _____.
- iv. CHRISTOPHER DISPAW, bp. 7 Feb. 1654.
- v. WILLIAM DISPAW, bp. 27 March 1657.

National Genealogical Society Quarterly Numbering System

The NGSQ numbering system is also a descending numbering system. It differs from the Register system in that all individuals are numbered. People with separate sketches are indicated with a plus sign.

Figure 3: National Genealogical Society Quarterly Number Systems³

THIRD GENERATION

4. Theunis⁸ De Clark, son of **Jacobus² DeClark (2)**, born May 20, 1708 at Tappan, christened there June 23, 1708.

Married Nov. 4, 1732 in New York City, **Catherine Nax (Nack)**, dau. of **Matthew Nax** and **Angenetje Schaats**.

Children of **Theunis⁸ De Clark** and **Catherine Nax** (christened at Tappan).

- +12. **Jacobus⁴**, born Oct. 20, 1733, chr. Oct. 21, 1733. Md. **Jannetje Springstein**.
13. **Angenetje⁴**, born June 13, 1735, chr. July 13, 1735.
14. **Matthys⁴**, born Sept. 30, 1737, chr. Oct. 23, 1737. Died young.
15. **Matthys⁴**, born Oct. 24, 1739, chr. Dec. 2, 1739.

² NEHGR, Vol 170: 298

³ NYGBR, Vol 96: 196

Resources

Rhonda R. McClure, "Getting Organized," Subject Guide at American Ancestors.

<https://www.americanancestors.org/tools/getting-organized>

Penelope L. Stratton and Henry B. Hoff, *Guide to Genealogical Writing* (Boston: NEHGS, 2014).

Joan Curran, Madilyn Crane and John H. Wray, *Numbering Your Genealogy* (Arlington, VA: National Genealogical Society, 2008).