

Preserving Your Family History Research: Documents, Bound Volumes, & Photographs

Organizing and Preserving Born-Digital Items

D. Fitch Henry, Digital Archivist



American Ancestors[®]

A NATIONAL CENTER FOR FAMILY HISTORY, HERITAGE & CULTURE

Meet today's presenter



Fitch Henry

Digital Archivist: R. Staton Avery Special
Collections, American Ancestors

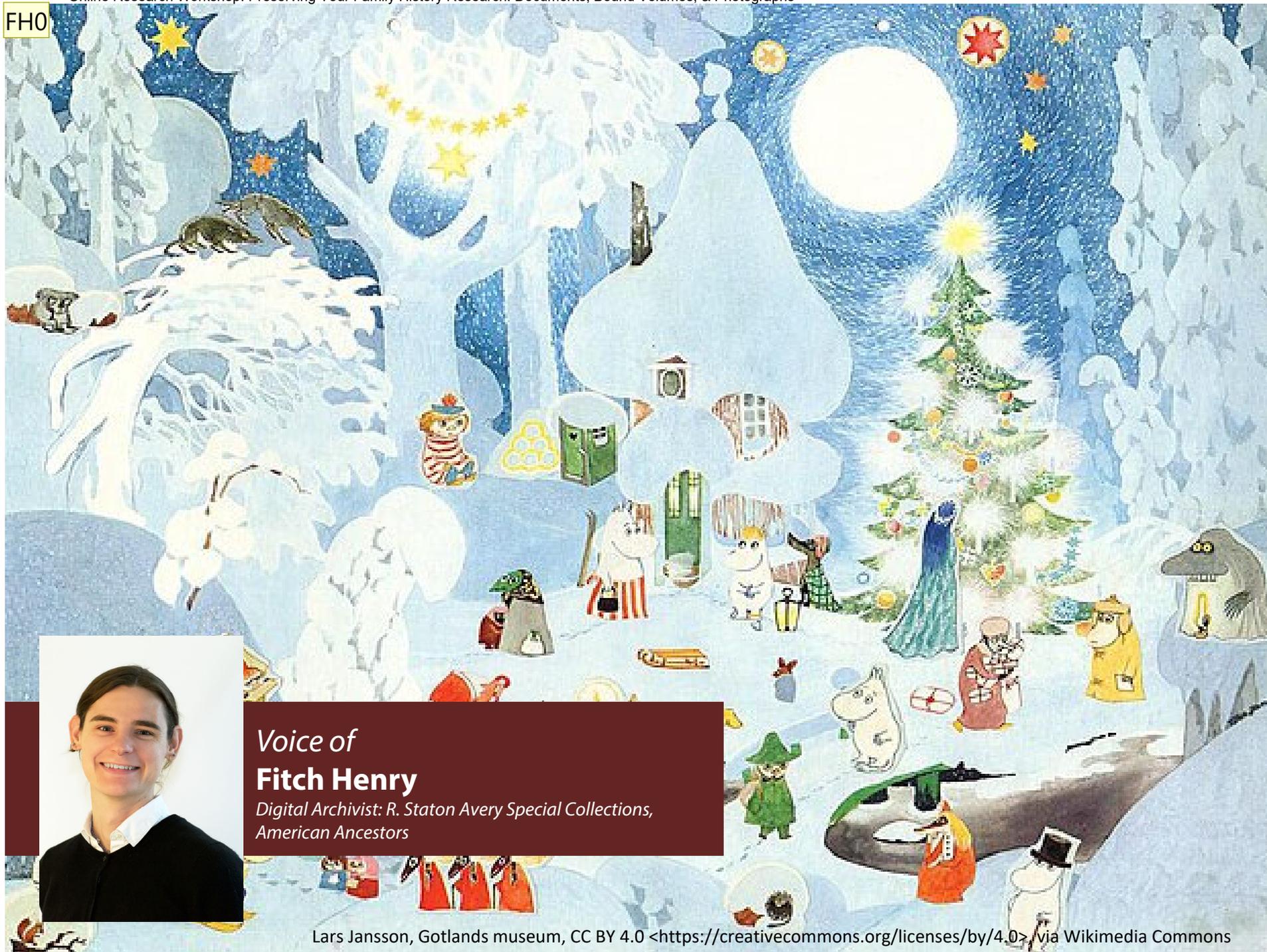
Slide 2

FH0

Change picture and introduction in speaking notes

Fitch Henry, 2025-01-23T20:21:22.278

FHO



Voice of
Fitch Henry
*Digital Archivist: R. Staton Avery Special Collections,
American Ancestors*

Lars Jansson, Gotlands museum, CC BY 4.0 <<https://creativecommons.org/licenses/by/4.0/>> via Wikimedia Commons

Slide 3

FH0

Add picture citation (from wikimedia)

Fitch Henry, 2025-01-23T20:21:42.540

Overview

- Background
- Digital Formats
- Lifecycle of Digital Stewardship
- Demo: Extracting files from Bible Records CD

Demo Prep

BORN DIGITAL

Information created
in an electronic format.

- An MS word document
- A photo taken with a digital camera or smartphone
- An email



[Lars Jansson, Gotlands museum, CC BY 4.0](#) via Wikimedia Commons

VS.

DIGITIZED

Exist in a paper
format and have then
been scanned.

- A polaroid photograph scanned as a jpeg
- A handwritten diary scanned as a PDF



Felton and Paine family letters, Mss A 10706, R. Stanton Avery Special Collections, New England Historic Genealogical Society, found online at [Digital.AmericanAncestors.org](#).

What Qualifies as a Personal Record?

Records are things constituting pieces of evidence about the past, especially an account of an act or occurrence kept in writing or some other permanent form (*Google Dictionary*)

Personal vs. Business Records

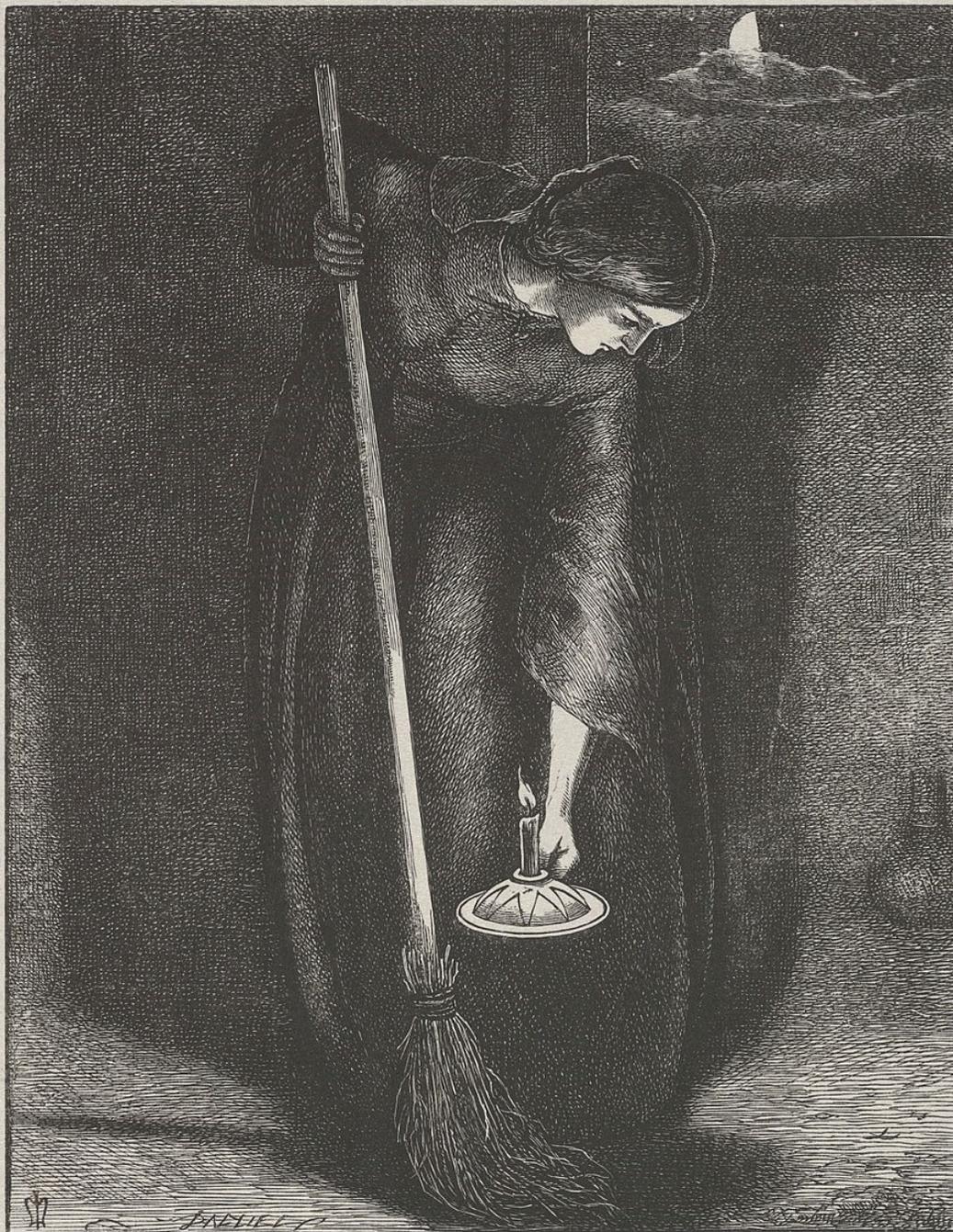
- An organization owns all its records that are created as evidence of its business transactions
- Likewise, individuals own records of their personal business transacted, and any other records created for historical purposes

Record I.D. and Inventory

- Questions to ask yourself when determining if something is a record:
 - Might I need this to substantiate a claim?
 - Is there a legal or financial/tax reason why I should preserve this?
 - Does this have intrinsic or historical value which makes me want to keep it indefinitely?
- Make a list of the records
 - Group into records and non-records
 - Determine how long to keep the records

Types and Retention of Personal Records

Record Type	Examples	Retention Period (how long to preserve)
Financial	Loan Payoffs, Tax Returns, Cancelled Checks, Bank Statements, Paycheck Stubs, Investment Statements, Medical Bills	Varies
Legal	Wills, Trust Documents, Marriage Licenses, Adoption Papers, Death Certificates, Deeds	Varies
Medical	Test Results	Indefinite
Historical	Photos, Videos, Audio, Scanned or “born digital” Documents	Indefinite



TIP:
You don't
have to
keep
everything!

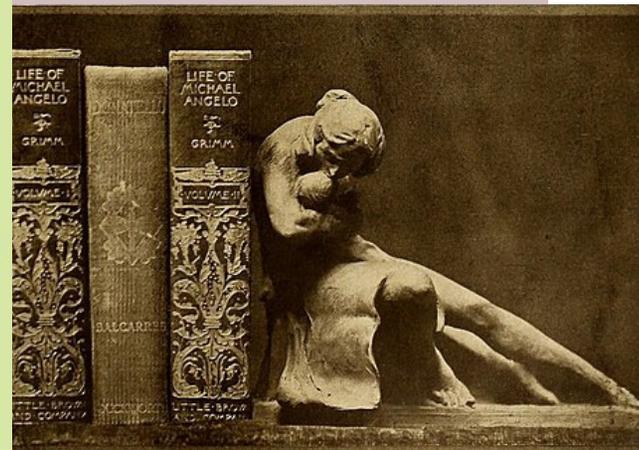
...

[Brothers Dalziel](#), CC0, via Wikimedia Commons

Formats of Records

- Records are increasingly being “born digital”
- Most records can be preserved digitally instead of in paper format
- Unlike paper records, long term digital records need special treatment

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Pannage, CC BY-SA 3.0 <<https://creativecommons.org/licenses/by-sa/3.0/>>, via Wikimedia Commons

Internet Archive Book Images, No restrictions, via Wikimedia Commons

What do you have? Where is it?

- Floppy Disks
- Flash Drives
- External Hard Drives
- CDs and DVDs
- Cloud storage
- Email Accounts
- Software Programs
- Smartphones
- Digital cameras
- Websites/blogs/social media accounts



MY “stuff”

- A CD with recording of my grandmother
- Scanned PDFs of my notes from library school
- Notes and photos on smartphone (“backed up” on laptop)
- Photos, papers, video files on laptop (backed up on Google Drive)

Bad archivist!



OH NO!

I have one, some,
or all of these
things!

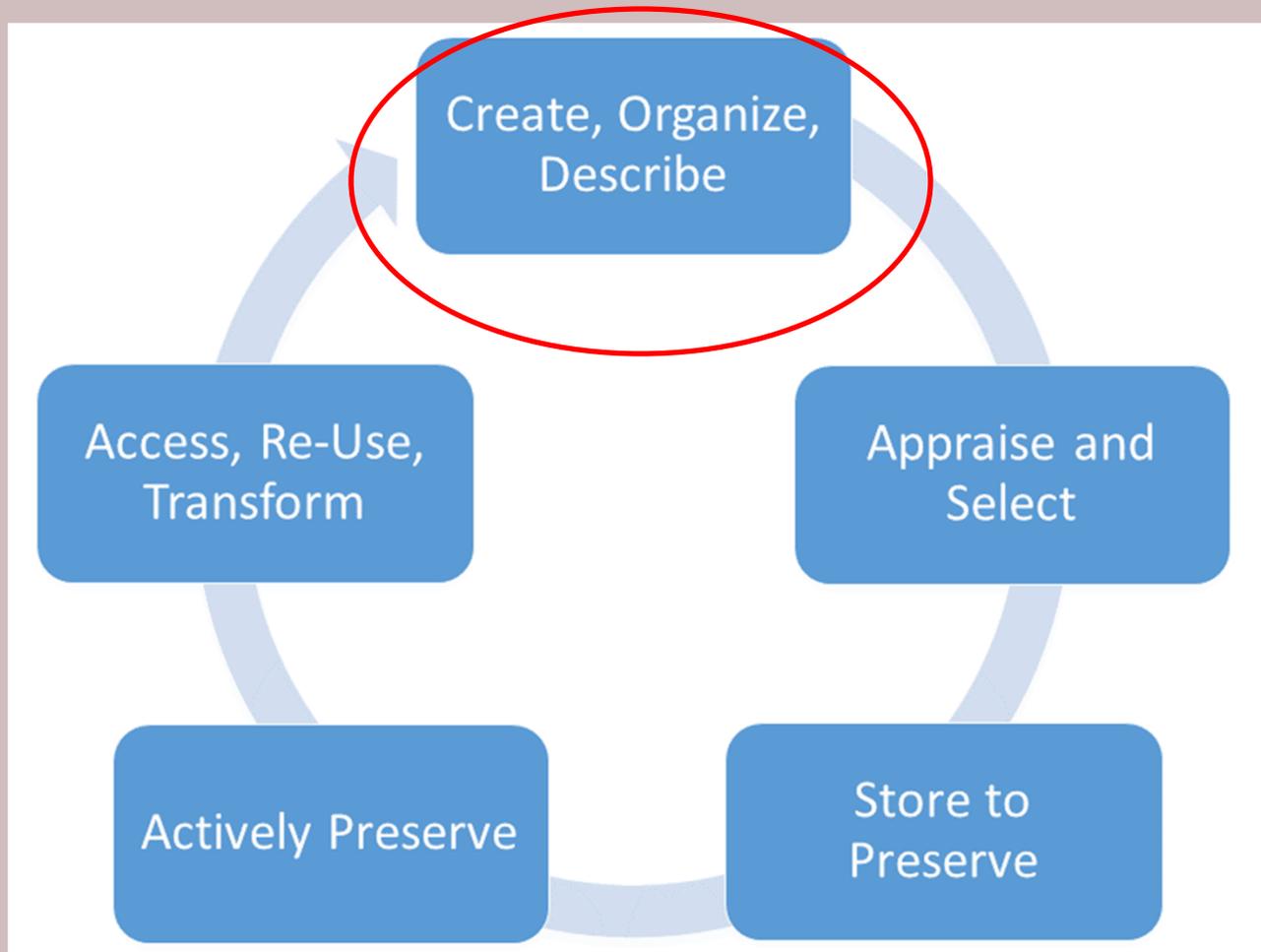


TIP:
Don't
panic!

...

Cary Grant and Katherine Hepburn in *Bringing up Baby*

Lifecycle of Digital Stewardship



Think Ahead

- How should you create your records?
- How will you be able to most easily find your records?
- How will you be able to use your records at a later date?

**If you can't find them or you can't open them,
they are of no use to you!**

Create Your Records

- As you create a record (start a new word document, take a photograph with your smartphone) you should think about:
 - Organization
 - File names
 - Folder structure
 - Metadata
 - Preservation
 - Back-up
 - Check-in

“Findability”



IMG_4091.HEIC

Things that can increase findability and factors that assist with this:

- Ability to be able to find using a search tool
 - Metadata
 - Full Text Indexing
 - Intelligent and Standard file naming
- Ability to find manually
 - Intelligent and Standard Organization
 - Intelligent and Standard file naming

“Findability”



IMG_4091.HEIC

TRY!



Fri, Jan 10, 2025 · 10:49 PM

Add description...

Details

 iPhone 13 mini
f/1.6 · 1/5 · 5.1mm · ISO2500

 IMG_4091.HEIC
12.2MP · 3024 x 4032 · HDR

 On device (1.2 MB)

 Backed up (1.2 MB)
Original quality. [Learn more](#)



The photos and videos you back up are kept safe and secure.
[Learn more](#)

 Add a location

 Edit date & time

Unique & Descriptive File Names

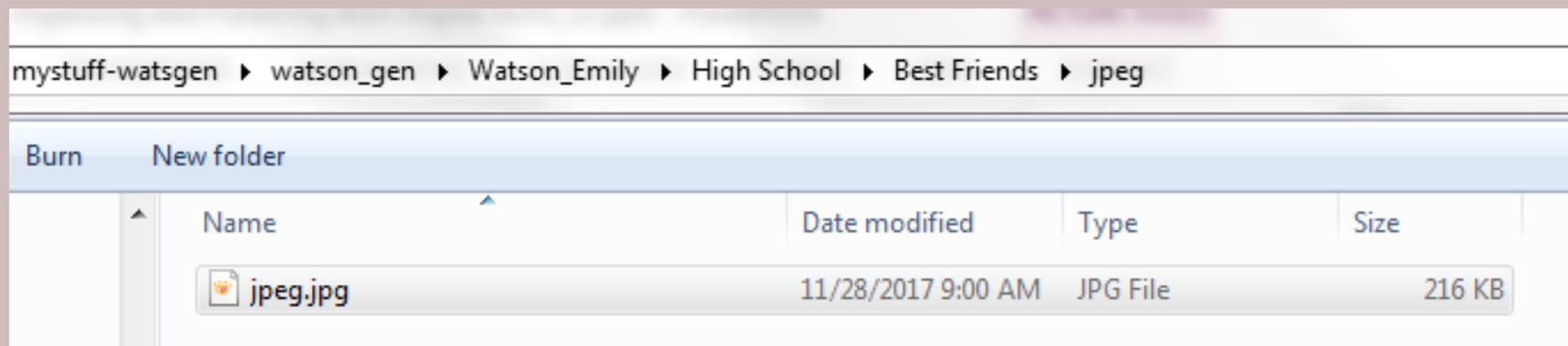
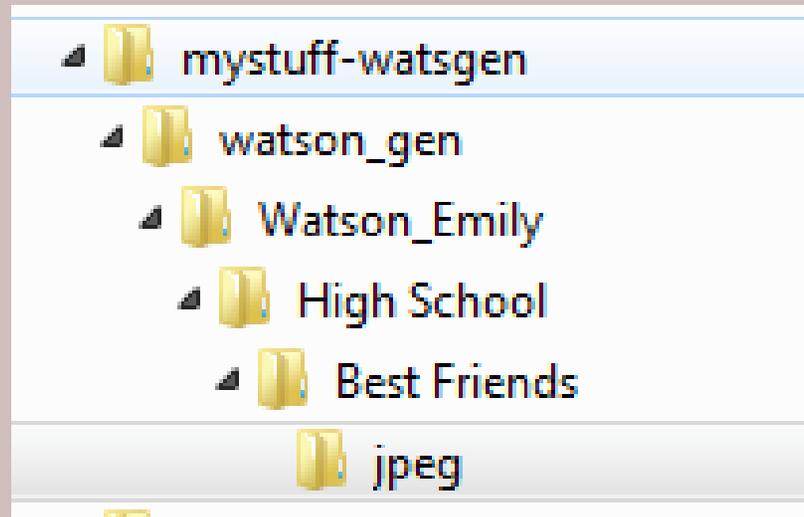
How do you name your digital photographs?

- *IMG_4091.HEIC* *hmmm!*
 - Consider: *sacha_cat_20250110.heic*
 - Even better: *sacha_cat_on_stairs_20250110.heic*
 - add descriptive metadata embedded in photograph

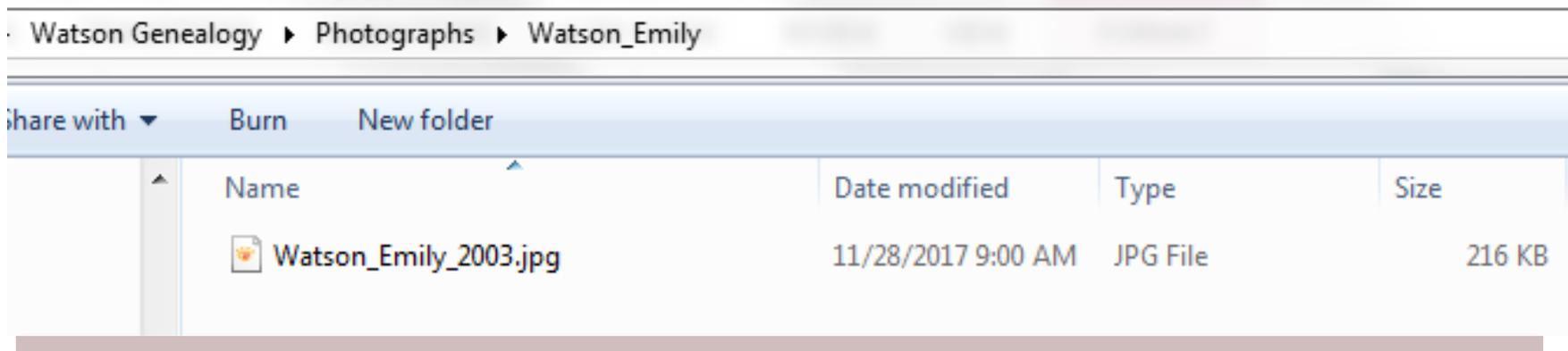
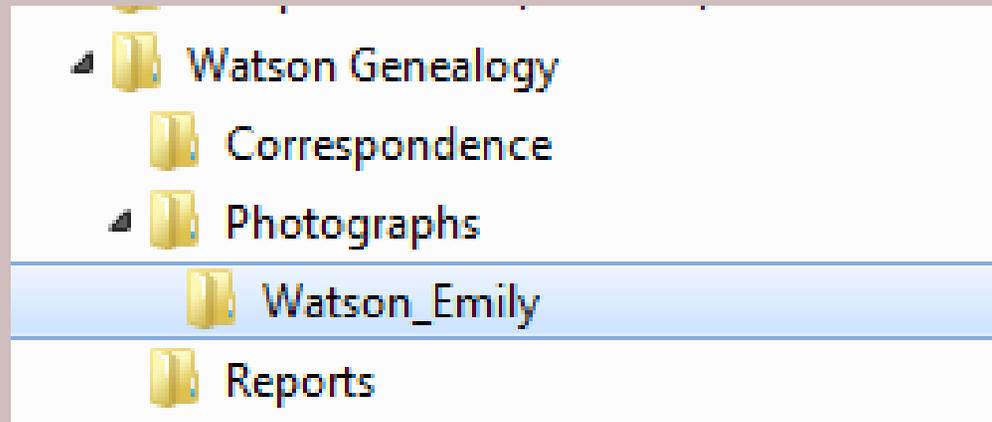
How do you name your word documents?

- *genealogyreportfinaldoc.doc*
 - Consider: *watsongenealogy_final.doc*

Folder Trees: Don't!

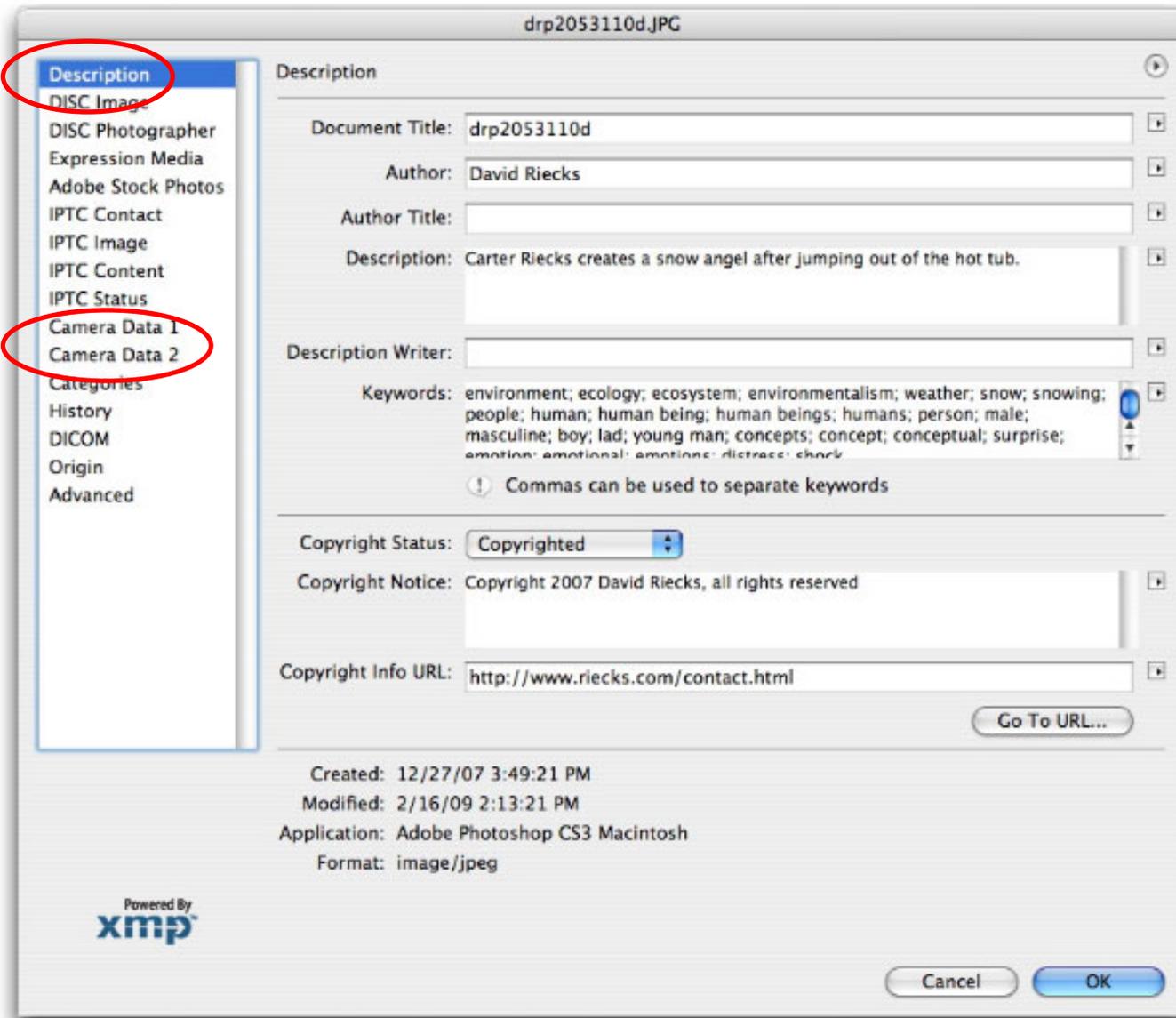


Folder Trees: Do!



Adding Metadata

- Metadata: Data about data
 - Or, “words used to describe an item”
- All born digital items have basic metadata that is automatically created every time you “touch” an item
- You can add more metadata as the user



The Description Panel of the File Info in Photoshop CS3

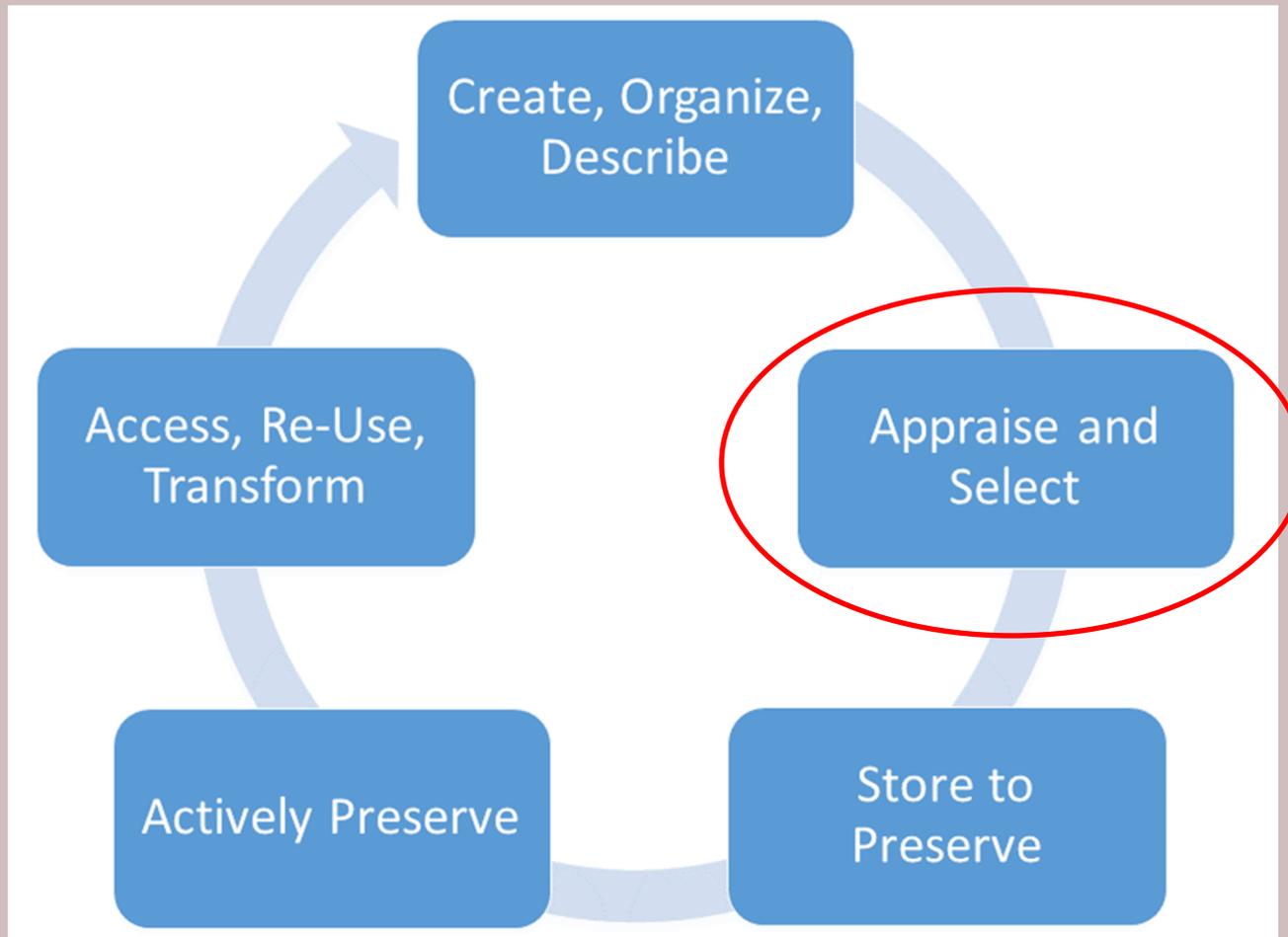
www.photometadata.org/META-Tutorials-Adobe-Photoshop



TIP:
Keep it
Simple!

...

Lifecycle of Digital Stewardship



Appraisal: I.D. and Inventory

- Is this a record? Ask...
 - Might I need this to substantiate a claim?
 - Is there a legal or financial/tax reason why I should preserve this?
 - *Does this have intrinsic or historical value which makes me want to keep it indefinitely?*

Appraisal: Decisions

- The records' provenance and content
- Their authenticity and reliability
- Their order and completeness
- Their condition and costs to preserve them
- **Their intrinsic value**

From the Society of American Archivists:

<https://www2.archivists.org/glossary/terms/a/appraisal>



TIP:
You don't
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everything!

...

[Brothers Dalziel](#), CC0, via Wikimedia Commons

Lifecycle of Digital Stewardship



Storage Options

- Cloud service
- External storage



Cary Grant, *The Philadelphia Story*

[Free Clip Art, CC BY-SA 4.0](#), via Wikimedia Commons

[Santeri Viinamäki, CC BY-SA 4.0](#) via Wikimedia Commons



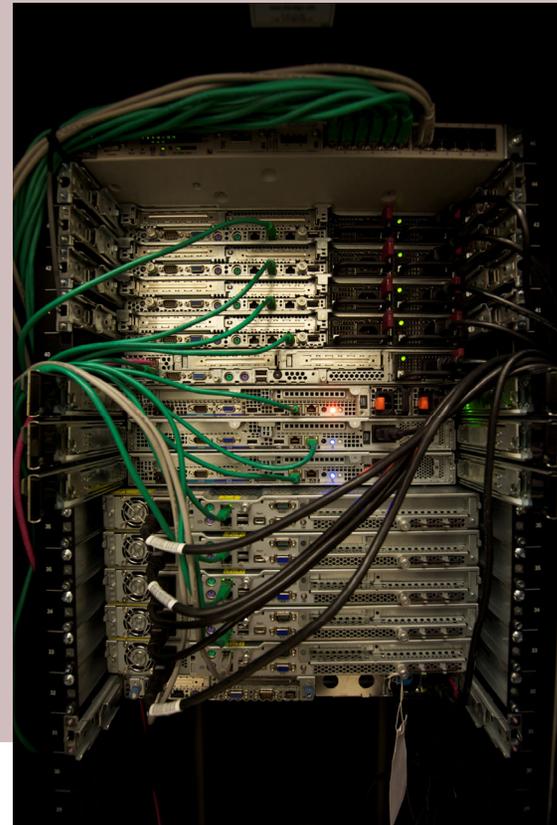
Cloud Storage

- Your photos, documents, music, email, etc. are stored and managed on servers that belong to someone else



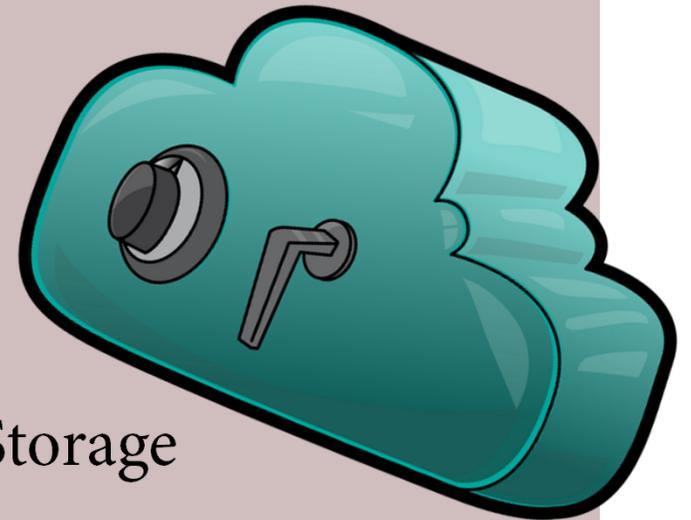
CompuCom

[Abigor, CC BY-SA 3.0](#) via Wikimedia Commons



Cloud Storage: Examples

- Google Drive - 15 GB Free Storage
- Apple iCloud - 5 GB Free Storage
- Dropbox - 2 GB Free Storage
- Box - 10 GB Free Storage
- Microsoft One Drive - 7 GB Free Storage
- Amazon Cloud Drive - 5 GB Free Storage



Comparison of Cloud Services:

http://en.wikipedia.org/wiki/Comparison_of_online_backup_services

[Free Clip Art, CC BY-SA 4.0](#), via Wikimedia Commons

Cloud Storage: Pros and Cons

Pros	Cons
Sync data from multiple devices and access data anywhere from any device	Security and privacy concerns
Provides backup and recovery of data	File type restrictions
Inexpensive storage option for small amounts of data	Companies and services are not permanent and can change

External Storage

Stores data outside of your computer, laptop, camera, phone, or other device

- External hard drive
- USB flash drive
- DVD
- Blu-ray
- CD

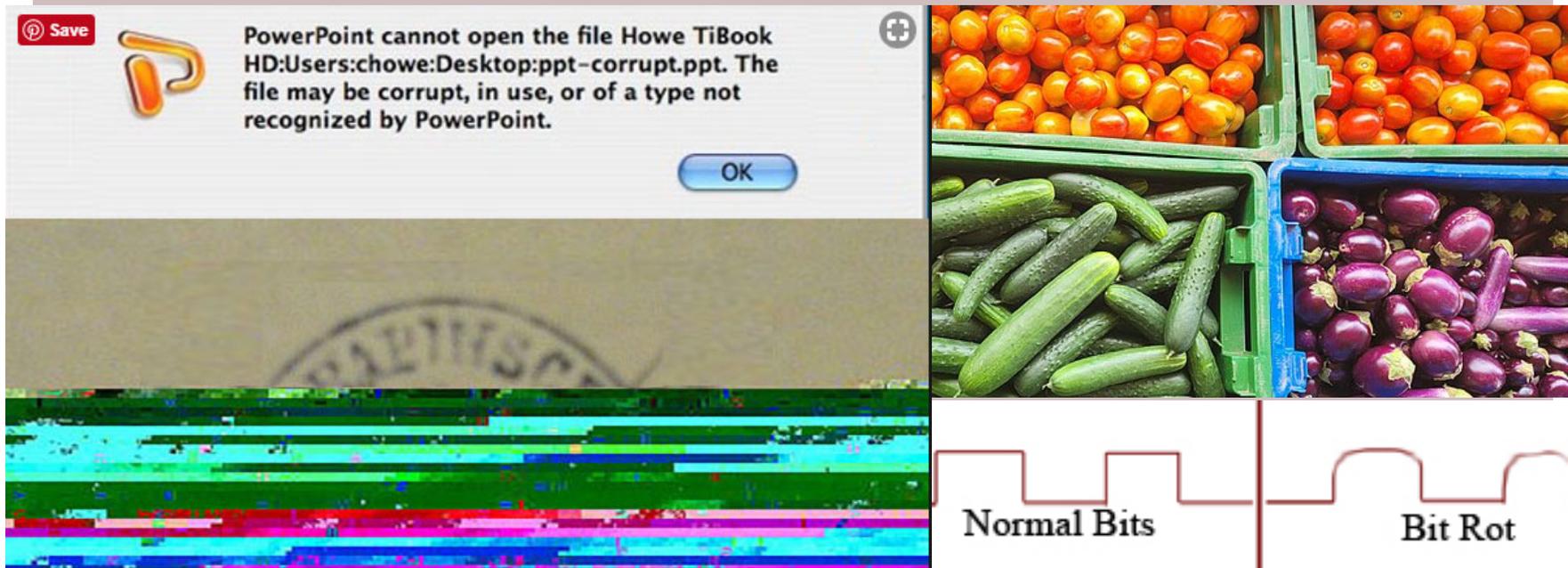


External Storage: Pros and Cons

Pros	Cons
You can store an unlimited amount of data outside of your device	Drives can be damaged or lost
Provides a backup for your data if your device is lost or damaged	Data can rot and decay over time
Cheaper than cloud storage	More expensive than an internal drive of equal capacity

Data Can ROT?

Bit rot is slow deterioration in the performance or integrity of data stored on media formats



www.erewise.com

Thedoubledeuce, Public domain, via Wikimedia Commons
[Pascal Kings, CC BY 4.0](#) via Wikimedia Commons

- LOCKSS -

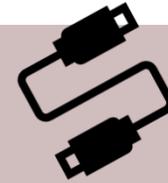
çOrw#r i#Frs Ihv#N hhs v#Wxi#Vdih²

Pros	Cons
If one copy is corrupted, you have a back up	Need to sync and monitor multiple systems
Convenience of local copy with security of possible geographic distribution	Additional cost of managing multiple options

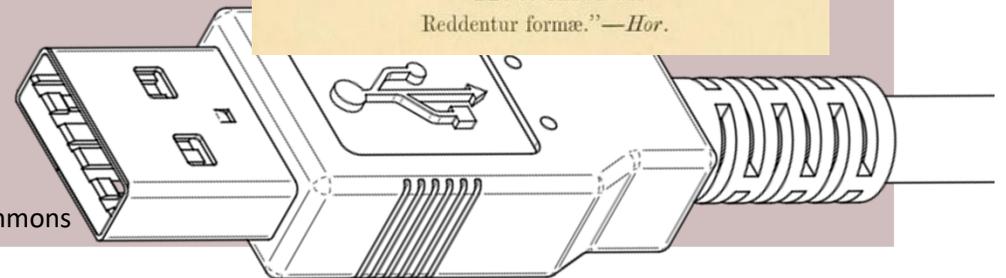
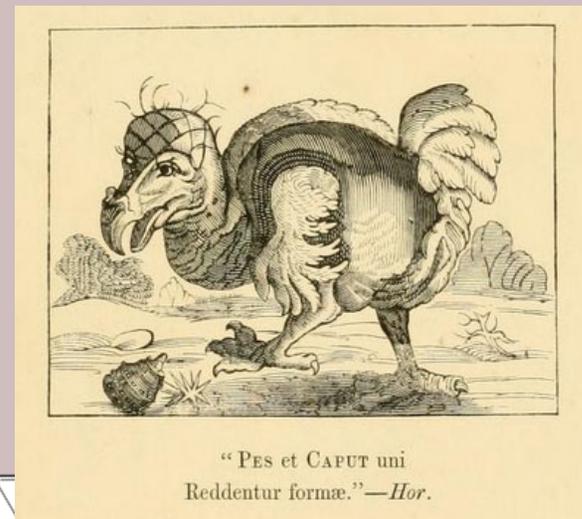




Long-term Usability



- Will you be able to open and use your records 5 years from now? 10 years? 20 years?
- Be mindful of the following:
 - File Formats
 - Storage Media
 - Storage Location



Inductiveload, Public domain, via Wikimedia Commons

The dodo and its kindred or, The history, affinities, and osteology of the dodo, solitaire, and other extinct birds of the islands Mauritius, Rodriguez and Bourbon, by H. E. Strickland and A.G. Melville; 1848; Reeve, Benham, and Reeve, London.

HARDWARE

VS

SOFTWARE

- Servers
 - Storage
 - Application
- Desktop Environment
 - Operating System
 - Storage
 - Drives
- External Drives/ Media
 - Storage
 - Transfer

- Proprietary vs. Open
 - File Types
- Types of Data Created





Open/Universal File Formats

DOCUMENTS

- Plain text (.txt)
- Rich text format (.rtf)
- PDF/A

Images (master copies)

- TIFF (.tif)
- JPEG2000 (.jp2)

Images (use copies)

- GIF (.gif)
- JPEG (.jpg)

Name	Date modified	Type	Size
 MssA3075-001	6/30/2023 10:19 AM	JPG File	1,652 KB
 MssA3075-001	6/30/2023 10:19 AM	TIF File	77,718 KB
 MssA3075-002	6/30/2023 10:18 AM	JPG File	1,541 KB
 MssA3075-002	6/30/2023 10:18 AM	TIF File	77,031 KB
 MssA3075-003	6/30/2023 10:18 AM	JPG File	1,505 KB
 MssA3075-003	6/30/2023 10:18 AM	TIF File	76,916 KB
 MssA3075-004	6/30/2023 10:17 AM	JPG File	1,605 KB
 MssA3075-004	6/30/2023 10:17 AM	TIF File	77,864 KB

Preservation File Formats

Media Type	File Format	Preservation Format	Access Format
Audio	AC3, AIFF, MP3, WAV, WMA	WAVE	MP3
Email	PST	MBOX	MBOX
Plain Text	TXT	TXT	TXT
Portable Document Format	PDF	PDF/A	PDF
Raster Images	BMP, GIF, JPG, JP2*, PCT, PNG*, PSD, TIFF, TGA	Uncompressed TIF	JPEG
Video	AVI, FLV, MOV, MPEG-1, MPEG-2, MPEG-4, SWF, WMV	FFV1/LPCM in MKV	MP4
Word processing files	DOC, WPD, RTF	Original Format	Original Format

GEDCOM Files... quickly

- **GE**nealogy **D**ata **CO**Mmunications
- Standard file format
- Enables sharing between genealogy software programs
- Save files in the native format **AND** as a GEDCOM (for preservation purposes)

Lifecycle of Digital Stewardship



The Essentials



- ✓ Back up files
- ✓ Check up on files
- ✓ Copy files/Save to latest version
- ✓ Remember the 2/2/2 rule:
 - Two copies
 - Two different formats
 - Two different locations

Email: The Elephant in the Room

- Identify your personal email accounts
- Within each account, find all the folders or other groupings of messages
- What has long-term value?
- Save attachments sent with the messages you're keeping.



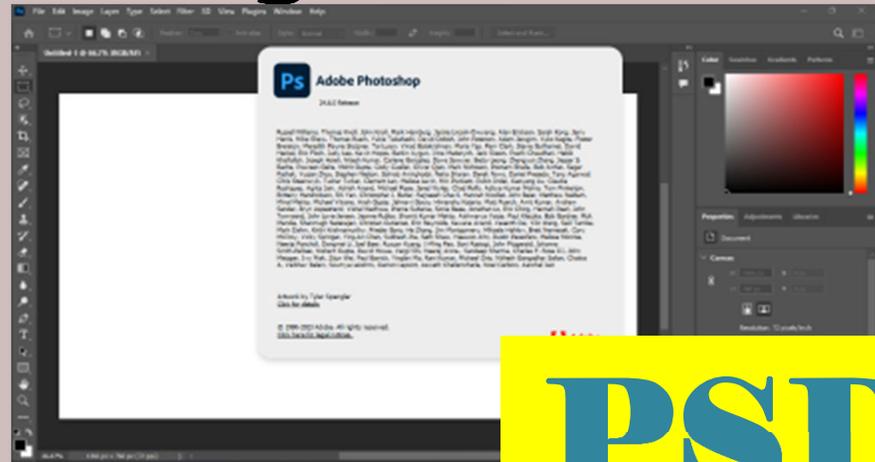
- Export
- Organize!
- Smart file names and directory structure!
- Copies and location

Documents

- Focus on what's important: items of long-term value
- PRINT critical files. This helps you focus on copying/migrating files not easily printed
- Multiple copies in multiple places!
- Remember: SMART file names
- Directory structure and description
- Check your files annually
- Convert files to universal output formats

Digital Images

- Copy! Migrate!
- Organize as you create
- Master vs. use copies
- PRINT THE IMPORTANT ONES!
- Don't rely on photo software (remember, software can go obsolete on you!)
- Save important files uncompressed or with lossless compression (TIF, JPEG2000)



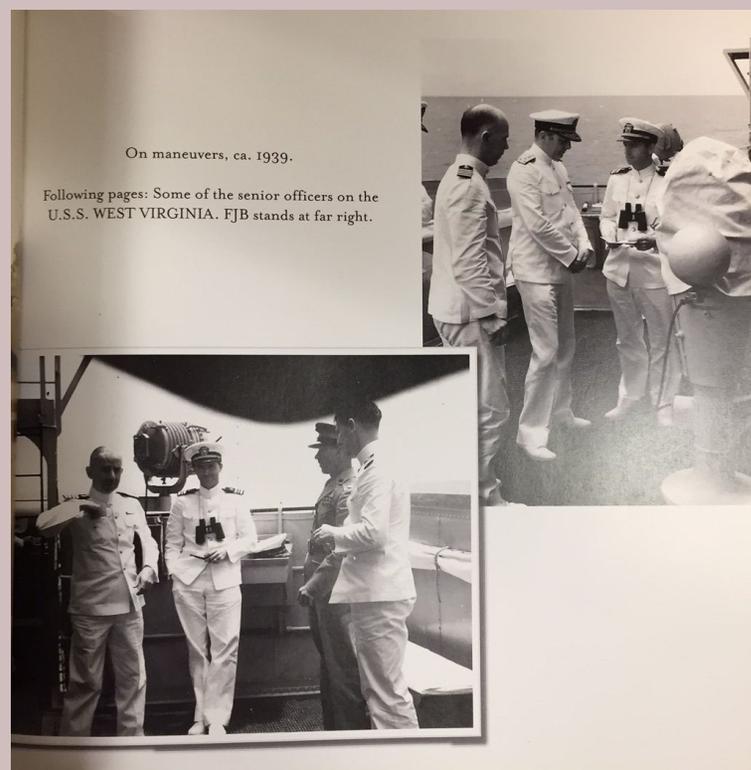
.PSD



By Adobe Inc. - Personal computer, Fair use,
<https://en.wikipedia.org/w/index.php?curid=74572887>

Digital Images: do/don't's

- DO print images on acid-free photo paper or books (albums, scrapbooks, or digitally printed books)
 - Shutterfly
 - Snapfish
 - Adorama Pix
 - Nations Photo Lab
- DO label and identify printed photos
- DON'T print photos at home with store-bought photo paper and ink



Example page from NEHGS' Editor-in-Chief Scott Steward's photo book

Audio and Video

- Identify/select
 - Multiple copies? Pick the better quality one
- Export
- Metadata
- Organize
- Copies and location!
- Check and migrate



Octave Uzanne's "The End of Books", in *Scribner's Magazine*, Vol. 16 (July–December 1894), 221–231.

Websites and Blogs

- Identify where you have websites
- What has long-term value?
- Export the information or take snapshots
 - Webrecorder
 - Webrecorder Player
 - Internet Archive-Save Page Now
 - Blog sites (Wordpress and Blogger) have instructions on downloading your sites)
- Organize
- Copies, copies, copies (location, location, location)
- Check and migrate

Social Media

- X (formerly Twitter):

https://blog.twitter.com/official/en_us/a/2012/your-twitter-archive.html

- Facebook:

<https://www.facebook.com/help/131112897028467>

<https://coptr.digipres.org/index.php/ArchiveFacebook>

- Instagram:

<https://instaport.en.softonic.com/web-apps?ex=RAMP-2639.2>

Digital Family Trees

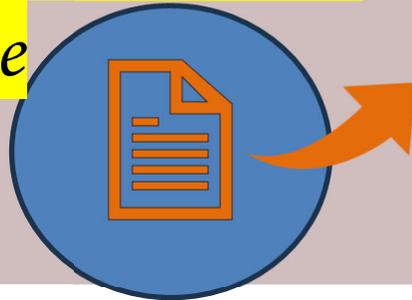
- Save the most recent (or final) version as a GEDCOM file
- Generate a narrative report as a word document
- If a narrative report is unavailable to you, export family group sheets and save as PDFs

Lifecycle of Digital Stewardship



Access

- Access:
 - Naming conventions (for files and folders)
 - Storage options
 - Summaries and descriptions
- Access also includes giving records to family or *donating records to an archive*



When Giving Personal Digital Records to Family/Heirs

- **Summary** description of the files (with your inventory!)
- **Intelligent file names:** date, location, and context
- Use **open** formats (PDF, TIFF, JPEG)
- Remember **2/2/2**
- **Stable** and moderate temperatures
- **New media copies** every 5 years to prevent data loss (bit rot)
- **Pass along digital passwords**

When Giving Personal Digital Records to an Institution

- **Summary** description of the files (with your inventory!)
- **Intelligent file names:** date, location, and context
- **Remove inappropriate material** (ask yourself: do you want other people to see this image/document/video)
- Use **open** formats (PDF, TIFF, JPEG)
- For family trees/narrative reports/group sheets: provide these as PDFs
 - Do not give files that are proprietary to the genealogical software
 - GEDCOM files are acceptable- but not preferable.

Re-Use



Copyright & Ownership

Personal Digital Archiving
Train-the-Trainer Workshop

October 11, 2016



Be Proactive About Your Rights



- Use a Creative Commons license standard
 - <https://chooser-beta.creativecommons.org/>
- Check out the DPLA's Getting it Right on Rights project
 - <https://dp.la/news/getting-it-right-on-rights/>
- Do you know what digital records you have licensed to another entity?
- Pay close attention to terms of service and user agreements

Transform

- Copies
- Artwork
- Film
- Music
- Exhibits

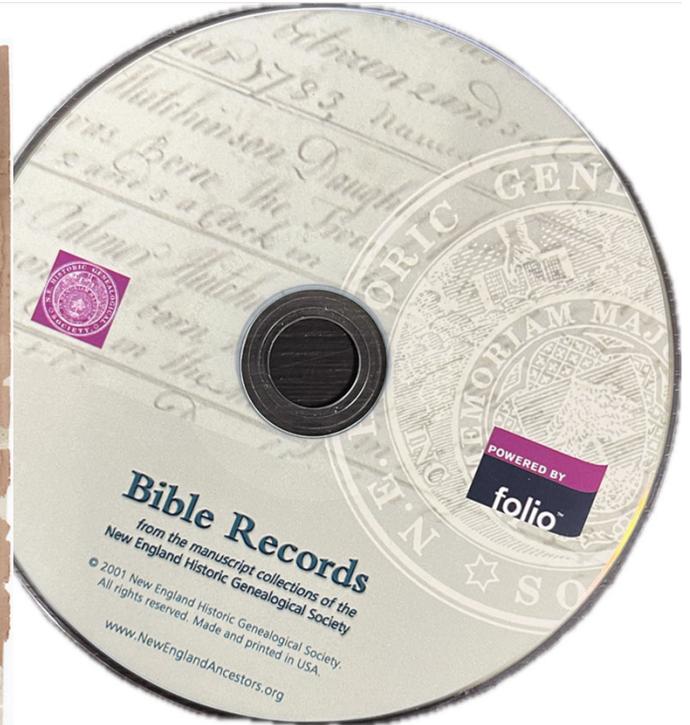
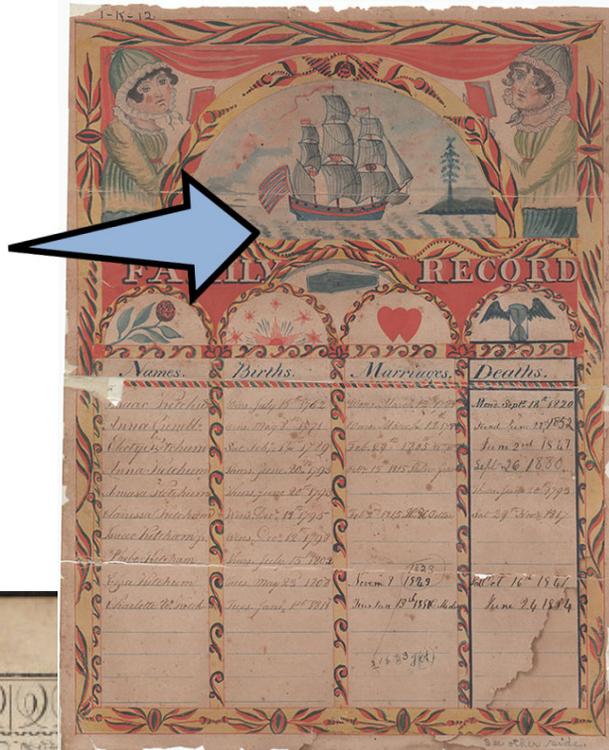
Artist: John Stezaker



QUESTIONS?

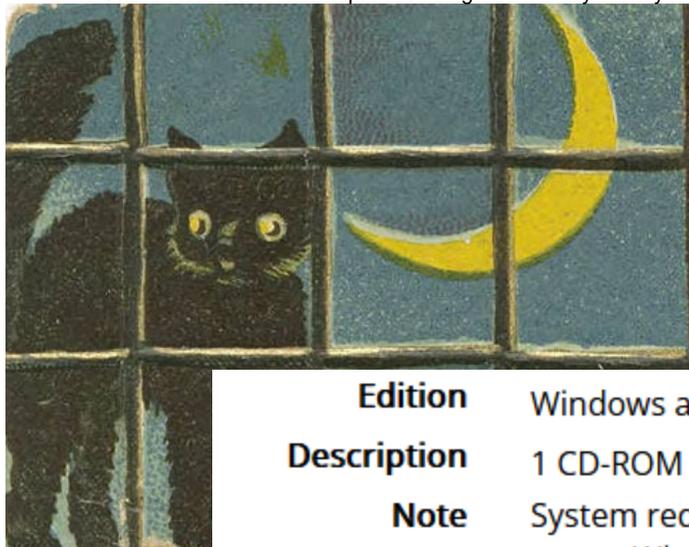
Demo

**Bible Records
Transcription
CD
(2001)**



[Isaac Ketchum] family record, Mss C 6, R. Stanton Avery Special Collections, New England Historic Genealogical Society, online at DigitalCollections.AmericanAncestors.org.

Bible record for the Nathan Pointer family (Mss A 7975). R Stanton Avery Special Collections, New England Historic Genealogical Society online at DigitalCollections.AmericanAncestors.org.



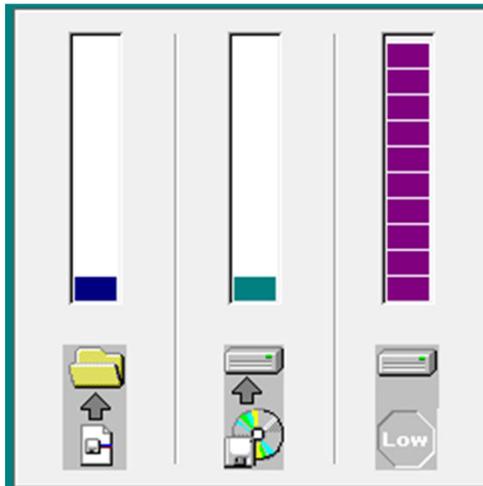
- Edition** Windows and Macintosh version.
- Description** 1 CD-ROM ; 4 3/4 in.
- Note** System requirements: PC Pentium processor; 32 MB RAM; 28 MB hard drive space; Windows 95, 98, NT 4.0 or 2000 operating system; VGA or higher resolution video adapter for monitor. System requirements: Macintosh PowerPC or higher; 20 MB RAM; 30 MB hard drive space; System 7.5 or higher (emulation mode only for System OS X).
- Contents** This CD-ROM contains thousands of birth, marriage, and death records abstracted from the Bible records in the NEHGS manuscript collection. Many records include information on individuals who left New England and migrated elsewhere, such as New York and the Midwest. Most family records include several generations.
- Note** "Powered by folio"--Disc surface.
Title from disc surface.
- Subject** [Bible records -- New England.](#)
[Registers of births, etc. -- New England.](#)
- Added Author** [New England Historic Genealogical Society.](#)



Folio Views and Copyright



Please read the following License Agreement. Press the PAGE DOWN key to see the rest of the agreement.



NEHGS End User License Provisions

Restrictions: You may not and you may not permit others to (a) disassemble, decompile or otherwise derive source code from the Software or data or any part thereof, (b) reverse engineer, reverse assemble, reverse compile or otherwise translate the Software or data or any part thereof, (c) modify or prepare derivative works of or from the Software or data or any part thereof, (d) copy the Software or data, except to make a single copy for archival purposes only, (e) rent, lease, sell, distribute or sublicense the Software or data or any part thereof.



Folio Views - [New England Family Bible Record Infobase - 2001]

File Edit View Insert Search Layout Tools Table Window Help

None

- HOW TO USE THIS CD
- THE BIBLE COLLECTION AT NEHGS
- ACKNOWLEDGEMENTS
- NEW ENGLAND FAMILY BIBLE RECORD INFOBASE -
 - 1. Mss C 23: Thompson Family
 - 2. Mss C 45: Cohoon Family
 - 3. Mss C 46: Bryant Family
 - 4. Mss C 71: Roberts Family
 - 5. Mss C 115: Moody Family
 - 6. Mss C 121: Andrew Family
 - 7. Mss C 122: Alexander and Whitaker Families
 - 8. Mss C 124: Atkins Family
 - 9. Mss C 128: Allen Family
 - 10. Mss C 131: Axtell Family
 - 11. Mss C 132: Alden and Reynolds Families
 - 12. Mss C 133: Alexander Family
 - 13. Mss C 135: Allen Family
 - 14. Mss C 136: Alley and Breed Families
 - 15. Mss C 137: Atkinson and Stevens Family
 - 16. Mss C 138: Ames Family
 - 17. Mss C 140: Atherton Family
 - 18. Mss C 142: Abrams Family
 - 19. Mss C 143: Adams Family
 - 20. Mss C 144: Allen Family
 - 21. Mss C 145: Allds Family
 - 22. Mss C 146: Allen Family
 - 23. Mss C 148: Anmock and Dearing Families
 - 24. Mss C 150: Adams Family
 - 25. Mss C 151: Abbot Family

NEW ENGLAND FAMILY BIBLE RECORD INFOBASE - 2001

7. Mss C 122: Alexander and Whitaker Families

practice of Law in the city of N. Haven in 1847. He left an infant son, 8 months old called by his own name.

Mary Elizabeth Aitchison, wife of Rev. W^r Aitchinson & eldest daughter of Rev. S.R. Andrew, died at Fitchville, Conn, Jan. 12th. 1853 aged 27 years. She left an infant daughter aged 7 months called by her own name.

Mary Elizabeth Aitchison, only daughter of Rev. William Aitchison & his wife Mary E. Aitchison died Sept. 10, 1853, aged 1 year & 3 months, at the residence of her grand parents in New Haven, & was buried in the same grave with her mother. See tombstone.

Rev. Samuel R. Andrew died May 26th 1858, aged 71 years.

7. Mss C 122: Alexander and Whitaker Families
 [Typed transcription. Given by Winthrop Alexander, of Washington, D.C., 28 January 1931.]

[Numbers are prefixed for convenience of reference]

Bible of Ebenezer Alexander (1765-1844)

1. Asa Alexander bom October 17, 1742
2. Mary Bond bom November 13, 1742

They were married November 13 1762

3. Ebenezer Alexander bom April 24, 1765
4. Thaddeus Alexander bom November 15, 1766
5. Marv Alexander bom November 9. 1768

ctrl + c ctrl + v .txt X2500



File Management

2 / 2 / 2

Two Copies:

- .DOC, .TXT
- Local File Server, Hard Drive

Unique Names

- Name files for our local manuscript call number.
- Include family last name

Further Processing

- Split up transcriptions page-by-page
- New media copies



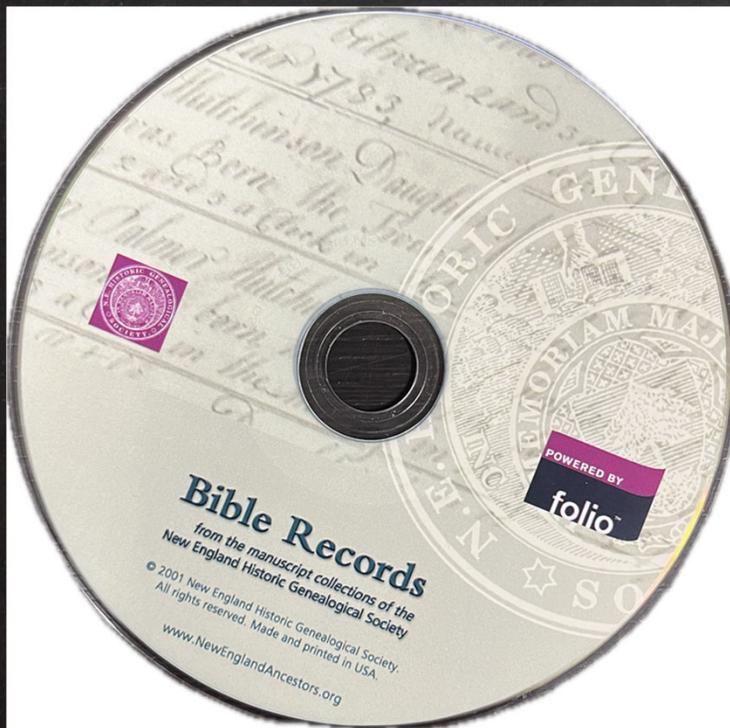
File View

Transcriptions > Bible records > mssa1708 > plaintext > verbatim_transcript_pages

Name	Date modified	Type	Size
MssA1708-004	9/17/2024 11:07 AM	Text Document	1 KB
MssA1708-005	9/17/2024 11:07 AM	Text Document	1 KB
MssA1708-006	9/17/2024 11:07 AM	Text Document	1 KB
MssA1708-007	9/17/2024 11:07 AM	Text Document	1 KB
MssA1708-008	9/17/2024 11:07 AM	Text Document	1 KB
MssA1708-009	9/17/2024 11:07 AM	Text Document	2 KB
MssA1708-010	9/17/2024 11:07 AM	Text Document	1 KB
MssA1708-011	9/17/2024 11:07 AM	Text Document	1 KB
MssA1708-012	9/17/2024 11:07 AM	Text Document	2 KB

Application: Imagine you have a drive like this

...



Your Turn!

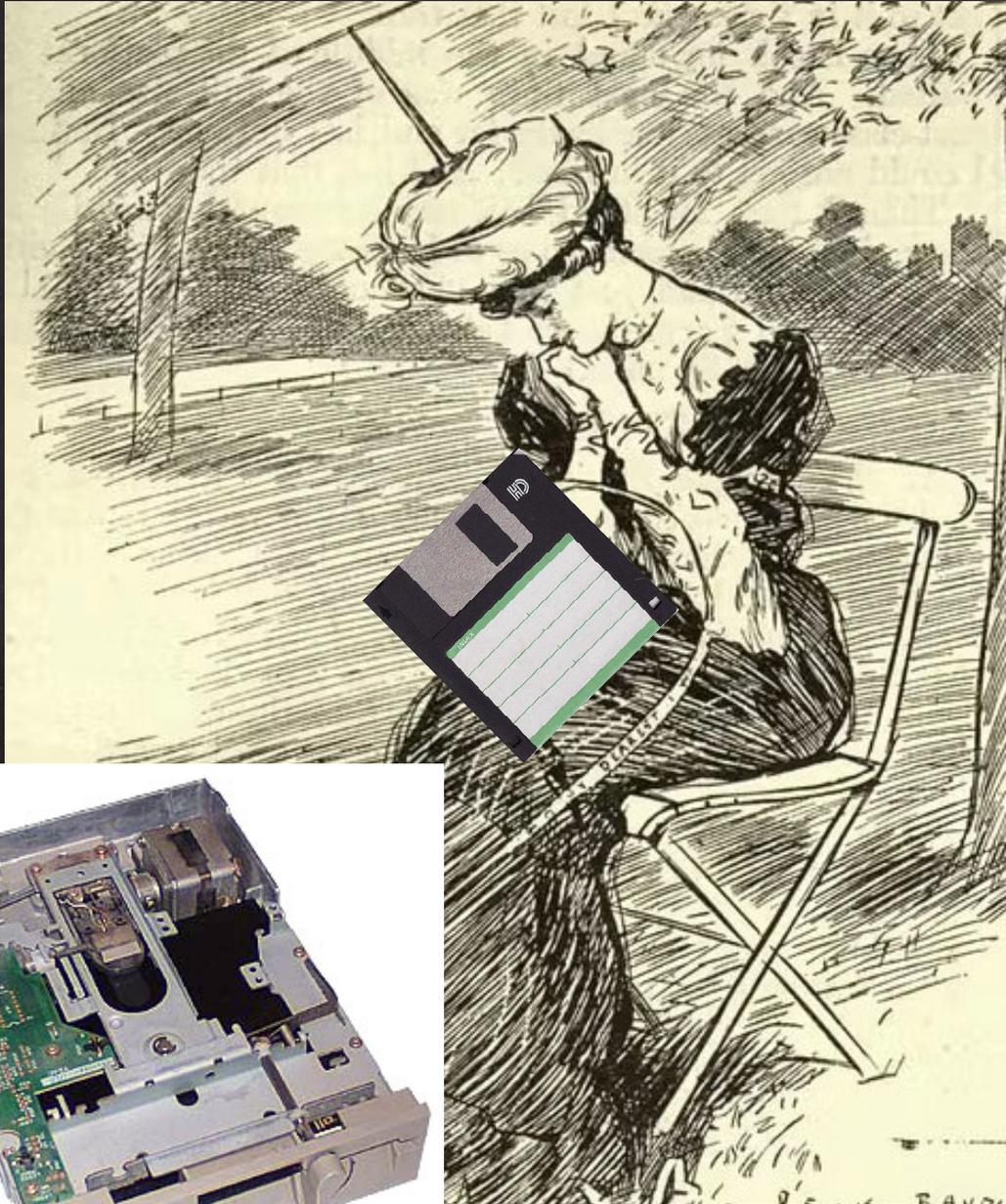
Survey your Digital Files

The screenshot shows the Microsoft Excel interface with the following data in the spreadsheet:

Item	Number	Content	File Name	Location	General Note
3.5 floppy disks	15	Marked as rough drafts of genealogy for Watson family	n/a	basement	Can't read files; need 3.5 floppy disk reader
CDs	2	Marked as images for Watson family	n/a	basement	Tried to read files; CD scratched
PDF	1	Watson family report- final	Watson_Genealogy_Final_2017	laptop	Print out also exists in file cabinet

Questions to Ask

- Is this important?
 - Yes: continue to question 2
 - No: throw it away
- Do I know what is on here?
 - Yes/No: continue to question 3
- Do I have a way to open these files?
 - Yes: go ahead and open them
 - No: identify what you need to open them



TIP:
You can buy
disk drives
online!

...

User Evil saltine on en.wikipedia, CC BY-SA 3.0
<<http://creativecommons.org/licenses/by-sa/3.0/>>,
via Wikimedia Commons

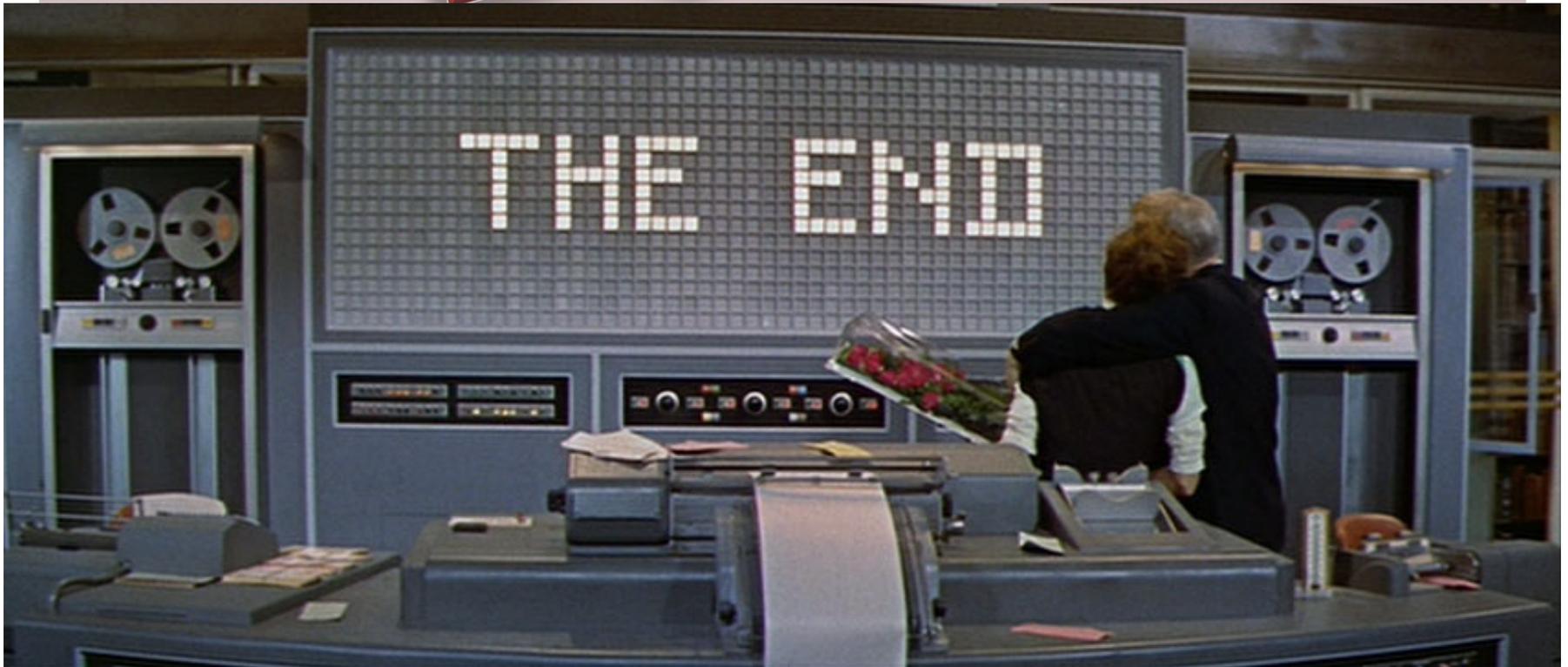
Travis, Public domain, via Wikimedia Commons

Punch, or the London Charivari; 1906; London,
Punch Publications Ltd., etc.

Organize Photos

- Use your photographs:
 - Name your files
 - Name your file folder
 - Create:
 - Two copies
 - In two formats
 - Store:
 - In two locations
 - Create inventory of images with notes

**You, too, can have a happy
technology ending!**



Spencer Tracy and Katherine Hepburn in *Desk Set*

QUESTIONS?



THANK YOU!

AmericanAncestors.org/Education



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