

Getting Organized: Research, Files, Findings

Class 3: Organizing Your Files

Rhonda R. McClure, rhonda.mcclure@americanancestors.org

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.

Organizing All That Research

To continue to push back the walls of uncertainty in your family research, you need to organize your research methods. Research can progress only if you know where you've been, and where you're going. Otherwise, you 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 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 genealogical certainty that once you answer a question, four or five new ones will appear. 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 several programs on the market that allow researchers to include free-form text. This is an excellent way to record questions as you record information about a person.
- *Other software programs:* In addition to genealogy software programs, researchers can create a question file in a database or notebook program. Be sure 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 American Ancestors' AncestryTrees also offer 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 as 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 is found by multiplying a person's number by two; the number of that person's mother is found by multiplying their number 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. 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, papers and notes 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 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, 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

Just as you need to have control of your paper files, it is essential that you also have control of your computer files.

Software Assistance

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 maintain and manipulate data. A few are listed here:

- *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/>).
- *Scanned photos:* 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 digitally using a basic spreadsheet to record the name of the file, and other pertinent information to identify the image.
- *Internet URLs:* 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.
- *Notebook software:* Offers family historians another way to track their research and things they find online, notes of questions, and theories along with the records found or data extracted from a book, record, 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.

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 requires some thought and planning. Some decisions on how to arrange these images will be determined by the scope 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 a system set up before going on a major visit that could result in many images
- 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 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.

Family Research

As was mentioned above, you may want to consider adopting the same system you have been using for your paper files. If you don't have any system, then you will want to think hard about how you research and where you save downloaded files from sites such as AmericanAncestors.org, Ancestry.com, and FamilySearch.org.

The goal is to not repeat prior research and to be able to pull up items quickly.

It is important to understand that when you are digitizing your paper files, the file names created will be dependent on how you are digitizing the files. Most cameras auto number the images as you take the photos. When working with a camera, it is always a good idea to take picture of the folder that holds the printouts first. This allows you to work through several folders at one time and move them to their appropriate counterpart on your computer.

It is also a good idea to create an inventory file for each folder that can be updated as you add more images to a folder, especially the next time you are actively researching that family.

You will either want to add the photo name (the one assigned by the camera or scanner) to your inventory OR you will want to rename the images after you have put them in the appropriate folder.

If you have a lot of papers to digitize, you may want to consider investing in a portable document scanner. Keep in mind these may not be allowed at all archives and repositories you visit, but it can make scanning your paper files at home much easier. Using a digital camera on a tripod is another option at home.

Tip: Back up your digital files in more than one place.

Special Projects

When it comes to working with special projects, perhaps a one-name study, an historical event, research for writing an article. In some instances, you may be offering to do some research for a friend who cannot visit the repository to which you are traveling.

It is always a good idea to keep detailed notes of the research you are undertaking with a special project, as well as a detailed list of the digital files you create. Where you store the files may be contingent on whether this is your personal project or if you are working with someone on a project.

For instance, you may want to use GoogleDrive or DropBox for sharing with others so that they have access to the files you find if you are working on a project with others.

Additionally, if you are traveling to different repositories for your project, you may want to consider using one of the above-mentioned notebook software options or tablet apps to keep track of everything.

If you are doing research on behalf of someone, you want to make sure that your notes are detailed enough that you can explain what you did look at, what you did and didn't find, and then identify the files appropriately. And it's always a good idea to keep your own back-up copy of any files you share with that person, just in case they misplace them.

Article(s)

Keeping track of research you undertake for publishing an article or articles often requires additional organization. You may have downloaded several out-of-print scanned books. You may be getting records from many different places as well as many different types of records. Consider arranging the folders for such a project to include:

- Published volumes
- Repositories
- Genealogies
- A folder for the actual article(s)

Tip: Track your research

Historical Subject

If you have a particular interest in an historical subject, then it is likely that you will have all manner of resources. There will be the very broad subject, such as Immigration or Civil War and thereunder you will likely collect articles, published volumes, photographs that have been digitized, and of course lots of digital documents.

Once again, arranging this so you can find things is best done with folders as well as inventories within the folders, again to make finding items easier.

Active Research

Once you have arranged your system to suit you, then it is a matter of keeping up with that system. If you are very comfortable with electronic files you may even want to use "meta data" to make finding things easier on your computer. However, if such a term causes anxiety, then simply make sure that between the name of the file and the information in the document, you could easily cite that source or know where to find it again.

When doing online research at home, immediately rename a downloaded file and move it to the appropriate folder on your computer. If you are keeping research logs or folder inventories, be sure to add the information immediately to those. This is much easier than downloading a lot of files and then trying to name them later. Also keep in mind that many online sites have information as to where the original records were located and that source citation can also be of use to you.

When researching at the FamilySearch library in Salt Lake City or one of their FamilySearch centers, you will have access to digitized images not available to you at home. Additionally, in Salt Lake City, there are many computers hooked up to microfilm scanners along with book scanners and many methods of digitizing your own perhaps photos, negatives, slides, etc. in their Memory Lane area. Keep in mind that these scanners are attached to computers, and you will save the file to a thumb drive. You may have an opportunity to name the files as you go, or you may have to simply wait until you are loading them onto your personal computer.

If you are traveling to archives or other repositories, check out their rules ahead of time as to what you can and cannot bring and use. For instance, the National Archives in Washington, D.C. allows you to use a document scanner that hooks up to your computer. The Public Record Office of Northern Ireland does not allow such devices. Both repositories though, allow you to also use digital cameras (with the flash turned off). You may want to plan on moving the images off the camera each evening back at the hotel and categorizing them appropriately. This frees up the digital card of the camera for the next day's work but also it is the best time to work with the images because everything is still fresh in your mind.

Keep in Mind

- ✓ Different projects or research approaches may require different digital organization
- ✓ Keep research logs or folder inventories
- ✓ When you begin to research a family for which you have paper files, that is the time to digitize them.
- ✓ If you are traveling, move the files from the thumb drive or camera to your computer and/or cloud storage each evening. When you are moving them, ensure that they are all readable (you don't want to get home and find that the images are blurry).

Bibliography

Sharon Carmack *Organizing Your Family History Search* (Blue Ash: Betterway Books, 1999)

William Dollarhide *Managing a Genealogical Project* (Baltimore: Genealogical Publishing Co., Inc., 1988, repr. 1999)

Laureen R. Jaussi *Genealogy Fundamentals* (Orem: Jaussi Publications, 1995)

Rhonda R. McClure *The Portable Genealogist: Organizing Your Research* (Boston: NEHGS, 2013)