Getting Organized: Research, Files, Findings

Class 3: Organizing Your Files

Rhonda R. McClure, Senior Genealogist

THE BRUE FAMILY LEARNING CENTER

American Ancestors
A National Center for Family History, Heritage & Culture

1

Meet today's presenter

Rhonda R. McClure
Senior Genealogist

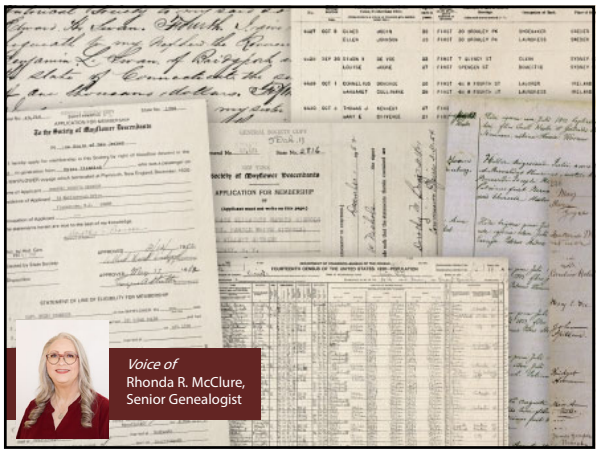
2

OVERVIEW

- **Presentation** (60 mins.)
  - Organizing Paper Files
  - Software Assistance
  - Organizing Digital Files
- **Q&A** (30 mins.)

3

©American Ancestors; produced by The Brue Family Learning Center



4

Organizing All That Research

- Research Logs (or research calendars)
- Preparing for Future Research
- Keeping Track of Families

5

Research Logs

- Date of research
- Repository
- Call number
- Description of source
- Comments or results
- Document number
- Misc. fields

6

©American Ancestors; produced by The Brue Family Learning Center

American Ancestors
A National Center for Family History, Heritage & Culture

Research Log

Repository: Family History Library - SLC Date: 20 MARCH 2010

Source Information (title, author, publisher, publication date, etc.)	Call Number (film number, URL, etc.)	Objective	Results
Johnson Co., Nebraska Marriage records Box 1, fol. 1-6 1858-1883	FHL 1941201	Find information on Benjamin STANDERFER family	Found marriage of Benjamin STANDEFORD to Mary HOLCOMB 14 FEB 1872, Vesta, Johnson Co., Nebr.
1870 Federal Census Wapello Co., Iowa	FHL 545921	" "	Extracted family of Isaah STANDERFER found on p. 55 in Center Twp.
Births and deaths of Stevens Co., Washington 1890-1907	FHL 979.723 V2b	" "	Searched for entry of Benjamin STANDERFER, who did not find
Tombstone inscriptions, Stevens County, Washington, by Carrie Lartique (Spokane, WA: n.p., 1976)	FHL 979.723 V2L	" "	Found entry for Benjamin STANDERFER, p. 88. Copied all pages for Addy Cem. where he is buried.

7

American Ancestors
A National Center for Family History, Heritage & Culture

Bookstore | About Us | Create a Tree | LOG IN

Search | Events | Join/Renew | Give | 10 Million Names | Publications | Expert Help | Tools | Projects | Centers & Initiatives

Research Templates

Research Plan Template

A research plan provides a roadmap for your genealogical research. This easy-to-use template takes you through the process of forming a good research question, identifying which records help you answer the question, clarifying record availability for your time period and location, and listing specific repositories where the records may be found.

Research Log

Research logs are an excellent way to keep track of the research you have already accomplished. They contain a list of every source you consulted —and whether your search was successful or not. Handwritten or typed, these logs help prevent duplicate searches and lookups.

Annotated Research Log

This annotated research log (excel file) provides a starting point for you to track your research and stay focused on the genealogical issue at hand. You can easily add columns, rows, and sort your findings.

Interview Questions

Gather information about your family and ancestors by interviewing family members, friends, and neighbors. These suggested interview questions will help!

AmericanAncestors.org/tools/research-templates

8

Research Log

Ancestor's name	
Standerfer, Drew, Farmer	
Objectives	Locality
Locate records on these families	IL, IA, NE, WA

Date of Search	Location/ Call number	Description of source (Author, title, year, pages)	Comments (Purpose of search, results, etc)	Copies Made
20 Mar 2000	FHL 1941201	Johnson County, Nebraska Marriage Records Box 1, fol. 1-6 1858-1883	Located the marriage of Benjamin Standeford to Mary Holcomb, 14 Feb 1872 in Vesta, Johnson, Nebraska	2 copies
20 Mar 2000	FHL 545921	1870 Federal Census Wapello County, Iowa	Extracted the family of Isaih STANDERFER found on p. 55 in Center Twp.	
20 Mar 2000	FHL 979.723 V2b	Births and Deaths of Stevens County, Washington 1890-1907	Searched for entry of Benjamin Standerfer who died in 1904 in Addy, Stevens Co., WA but did not find an entry	
20 Mar 2000	FHL 979.723 V2b	*Tombstone Inscriptions, Stevens County, Washington* by Carrie Lartique and Belva Pederson (Spokane, WA: n.p., 1976)	Located entry for Benjamin Standerfer on p. 88. Copied all pages for Addy Cemetery where he is buried. Also copied p. 43, listing of Highland & Calvary Cemetery with Standerfer entries	6 copies

9

Research logs may *also* contain

- Time Period
- Jurisdiction
- Surnames
- Condition of Source
- How Source Searched
- Source Number
- LOC Number
- ISBN Number

10

RESEARCH CALENDAR

SUBJECT:	RESEARCHER:	FILE NUMBER:

Date	Repository / Call No.	Description of Source	Ind / Cond	Search Objective	Time Period Searched	Comments	Doc. No.

11

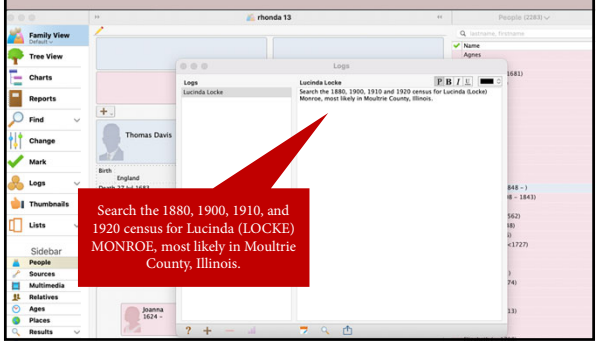
Preparing for Future Research

- Genealogical Software Programs
- Other Software Programs
- A Notebook

12

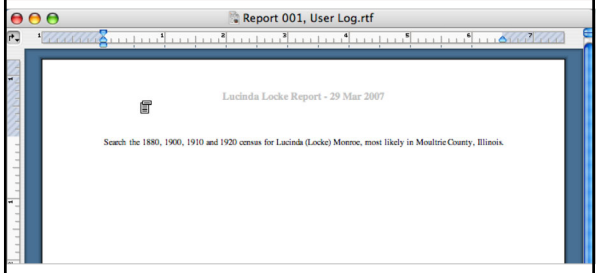
©American Ancestors; produced by The Brue Family Learning Center

Preparing for Future Research



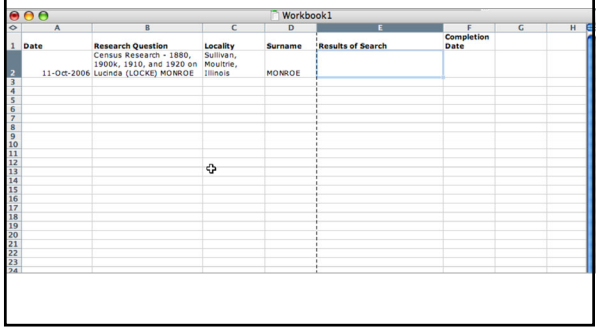
13

Preparing for Future Research



14

Preparing for Future Research



Date	Research Question	Locality	Surname	Results of Search	Completion Date
11-Oct-2006	Census Research - 1880, 1900k, 1910, and 1920 on Lucinda (LOCKE) MONROE	Sullivan, Moultrie, Illinois	MONROE		

15

Preparing for Future Research

16

Organizing All That Paper

17

Organizing All That Paper

- Notebook System
- Note Card System
- Surname Folder System
- Family Folder System

18

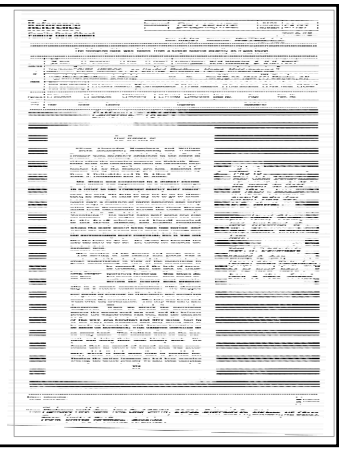
©American Ancestors; produced by The Brue Family Learning Center

Notebook System

- The Notebook System relies on a few simple rules:
  - Control the size of the paper (if using three-ring binders, then all the sheets would be 8.5 x 11).
  - Separate sheets by surname so that currently unrelated individuals can be included.
  - Within the surname sheets, separate by locality as this allows you to notice interaction between family units.
  - Assign each page in the binder a page number.

19

Notebook System



Example from:
William Dollarhide's
Managing a Genealogical Project
(Published by GPC, Inc.)

20

Surname Folder System

Two options:

- ***Document Number:*** Consecutive numbering assigned as each new piece of evidence is located and added to the surname folder
- ***Locality/Page Number:*** Similar to the Notebook system wherein the surname, locality and consecutive number is used

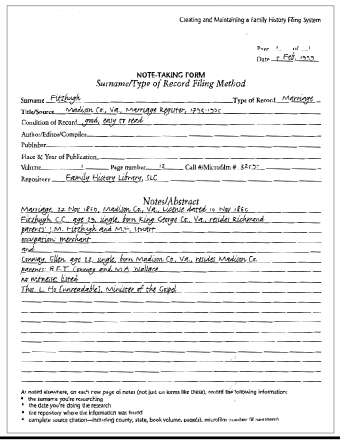
21

©American Ancestors; produced by The Brue Family Learning Center

Surname/Type of Record

- Another way to organize by surname, as developed in Sharon Carmack's *Organizing Your Family History*
- Note-Taking Form includes places for surname, type of record, publication information about the record, repository, and notes from the record

22



Creating and Maintaining a Family History Filing System

Page 1 of 1

Date 1 Feb 1933

NOTE-TAKING FORM

Surname/Type of Record Filing Method

Surname Fitzhugh Type of Record Marriage

Title/Source Madison Co., Va., Marriage Register, 1792-1936

Condition of Record good, only ck used

Author/Editor/Compiler

Publisher

Place & Year of Publication

Volume 1 Page number 12 Call #/Microfilm # 5203

Repository Family History Library, SLC

Notes/Abstract

Marriage 12 Nov 1810, Madison Co. Va., bond date 10 Nov 1810.
Fitzhugh, C.C. age 19, single, born King George Co. Va., resides Richmond
parents: J.M. Fitzhugh and Mrs. Hunter
witnesses: Marriage
and
Coonrage, Glen, age 18, single, born Madison Co. Va., resides Madison Co.
parents: R.F.T. Coonrage and M.A. Wallace
no witness bites
The Rev. Hx (unreadable), Minister of the Gospel

At minimum, on each new page of notes (not just on forms like this), record the following information:

- the surname you're researching
- the date you're doing the research
- the repository where the information was found
- complete source citation—including county, state, book volume, page(s), microfilm number (if available)

23

TABLE OF CONTENTS FOR FILES

Surname Record Type

Enc.#	Date	Listing of Search	Repository/Address	Source Citation	Results	Date Rec'd	Money Sent

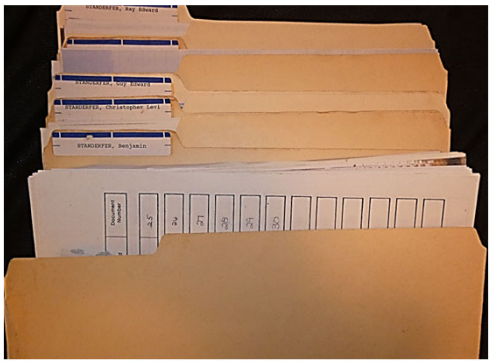
You are free to copy this form for personal use. For instructions on filling it out, see page 24.

24

Family Folder System

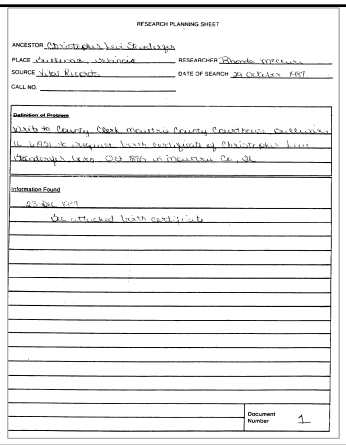
- ***Research Planning Sheet:***
  - Provides spaces for specific information about a research problem
  - Includes all information about the individual being searched and the source being used
  - Allows the researcher to define the research problem and record the results of the search
- ***Research Inventory Sheet:***
  - Used in family folders
  - An index to the holdings of that folder
  - Offers spaces for each document in the folder that reminds the researcher when, where, and what was searched

25



Surname Folders

26



RESEARCH PLANNING SHEET

ANCESTOR Christopher Lee Standerfer

PLACE Kankakee, Illinois RESEARCHER Rhonda Brewer

SOURCE Vital Records DATE OF SEARCH 24 October 1987

CALL NO.

Definition of Problem

Visit to County Clerk Kankakee County Courthouse, Kankakee, IL. Look for original birth certificate of Christopher Lee Standerfer born Oct 1950 in Kankakee Co. IL.

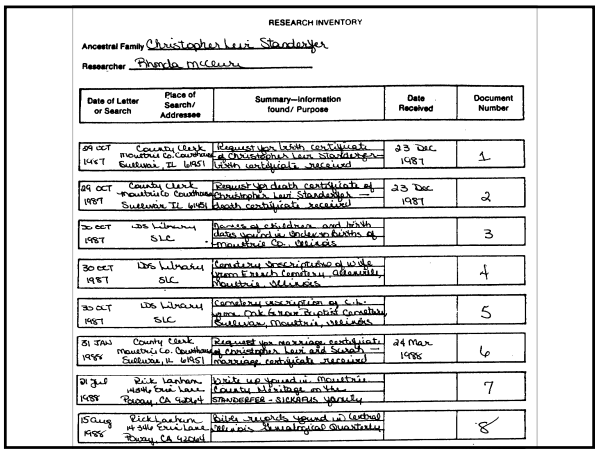
Information Found

25 Dec 1950

Obtained birth certificate

Document Number 1

27



RESEARCH INVENTORY

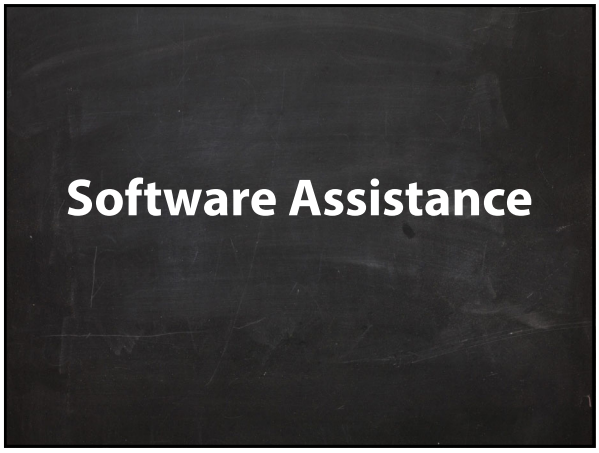
Ancestral Family: Christopher Levi Standerfer

Researcher: Pamela McClure

Date of Letter or Search	Place of Search/ Addressee	Summary—Information found/ Purpose	Date Received	Document Number
29 OCT 1987	County Clerk Moultrie Co. Courthouse Sullivan, IL 61951	Request for birth certificate of Christopher Levi Standerfer — birth certificate received	23 Dec 1987	1
29 OCT 1987	County Clerk Moultrie Co. Courthouse Sullivan, IL 61951	Request for death certificate of Christopher Levi Standerfer — death certificate received	23 Dec 1987	2
30 OCT 1987	LDS Library SLC	Access of ancestors and birth dates found in Index to Births of Moultrie Co., Illinois		3
30 OCT 1987	LDS Library SLC	Cemetery Description of Wife from Etzel Cemetery, Allenville, Moultrie, Illinois		4
30 OCT 1987	LDS Library SLC	Cemetery description of Lulu Mae Oak Grove Rural Cemetery, Sullivan, Moultrie, Illinois		5
31 JAN 1988	County Clerk Moultrie Co. Courthouse Sullivan, IL 61951	Request for marriage certificate of Christopher Levi and Sarah — marriage certificate received	24 Mar 1988	6
31 Jul 1988	Rick Lanham 14345 Erie Lane Poway, CA 92064	Wills not found in Moultrie County Illinois on the STANDERFER - SICKAFUS family		7
15 Aug 1988	Rick Lanham 14345 Erie Lane Poway, CA 92064	Wills records found in Central Illinois Genealogical Quarterly		8

28

29



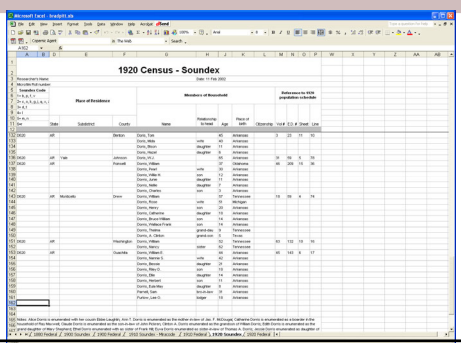
30

Organizing with Software

- ***spreadsheet programs*** offer the ability to extract and record information from the census in a computerized format.
- ***genealogy database programs*** can be the best option as they allow the creation of documents for the different types of records, but yet keep it all together.
  - Check out Ancestor Detective's **Clooz**™!
- ***notebook programs*** offer methods of recording your research in easy to search files that in which you can copy and paste things from the web and keep track of questions or hypothesis.

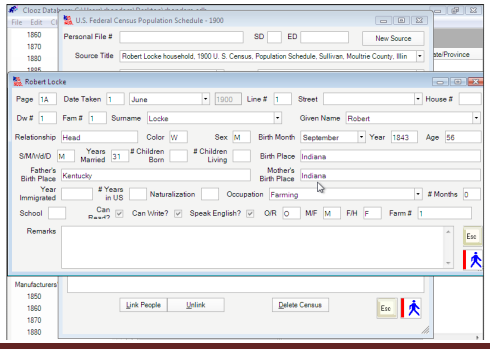
31

Census Spreadsheets



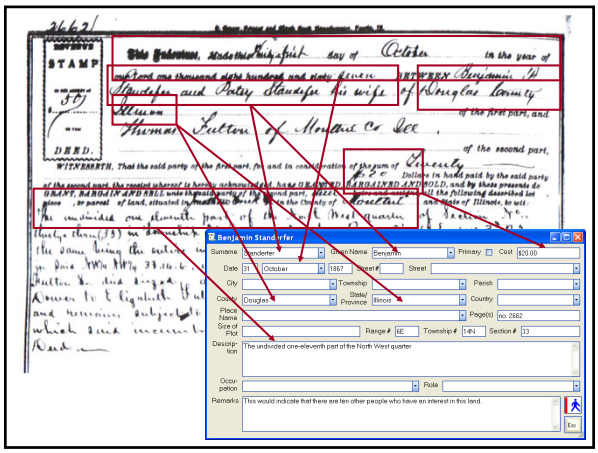
32

Clooz



Available from Ancestor Detective at www.clooz.com

33

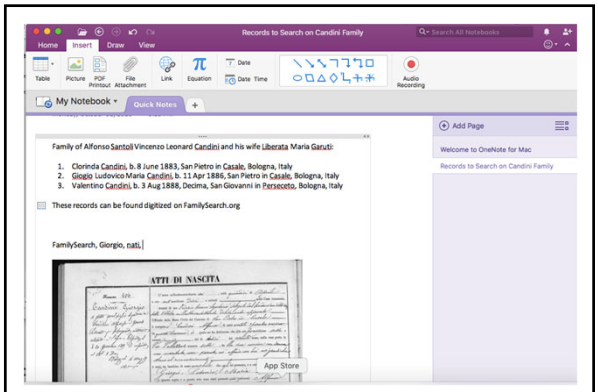


34

Notebook Software

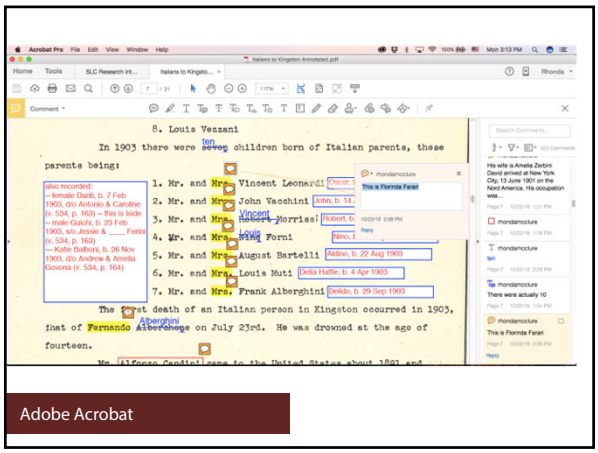
- Notebook software is another general type of software that can be effective in genealogical research:
  - Microsoft OneNote is part of Microsoft 365
  - If you have Windows 10 then you already have OneNote
  - Adobe Acrobat
  - Goodnotes
  - Notability (Apple only)

35



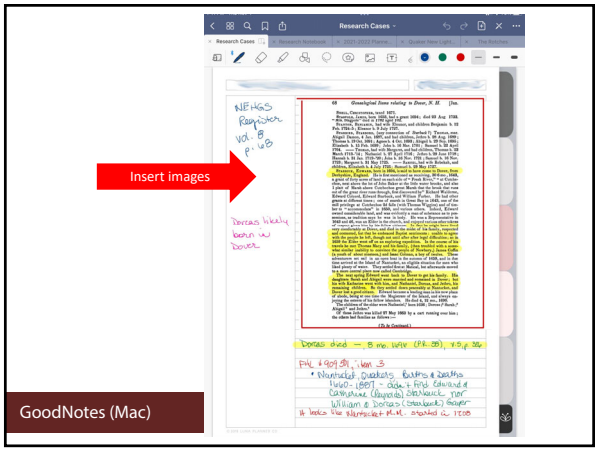
Microsoft OneNote

36



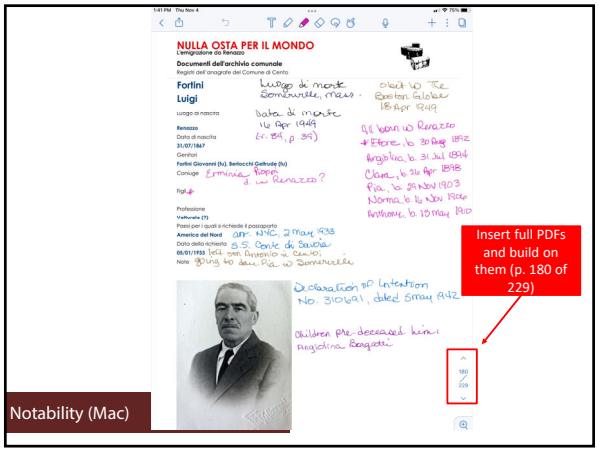
Adobe Acrobat

37



GoodNotes (Mac)

38

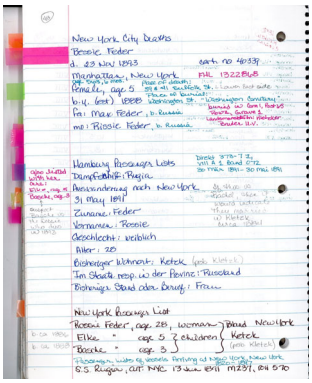


Notability (Mac)

39

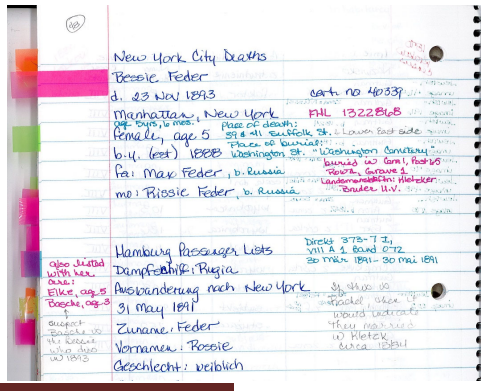
[eI
A spiral bound notebook can be just as good.

40



Page from a research notebook

41



Page from a research notebook

42

Organizing Digital Files

43

Organizing Digital Files

- Requires a plan
- Identifying the scope
- Family research vs Special Project
- Active Research

44

Scope

45

©American Ancestors; produced by The Brue Family Learning Center

Scope

- Determine the primary focus of the images:
  - Family documents
  - Historical Subject
  - Special Project
- If family related treat images like you would paper copies.
- Special projects may be done differently.

46

Family Research

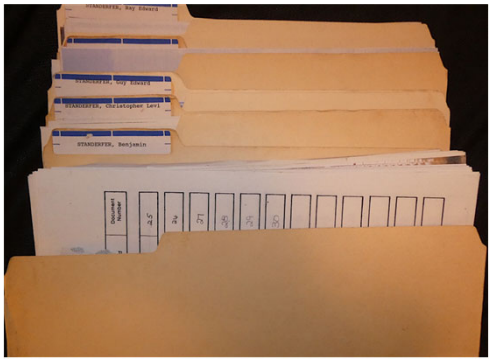
47

Paper Files and Computer Files

- Consider adopting the same system you use with your paper files and create similar folders on the computer.
- Digitized everything in paper files
- BACK UP digital files (preferably in more than one place)

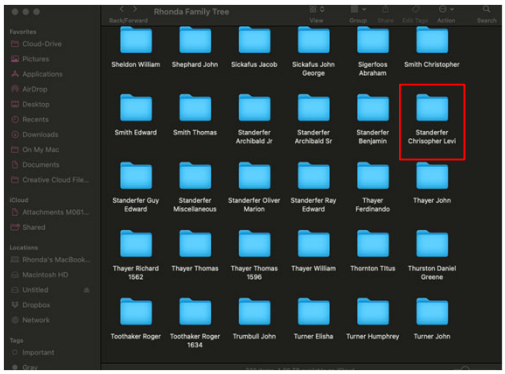
48

©American Ancestors; produced by The Brue Family Learning Center



Family Folders

49



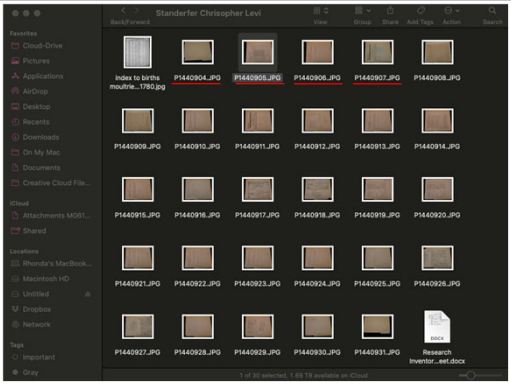
Family Folders

50

[eT

Digitize your paper files and print your digital files.

51

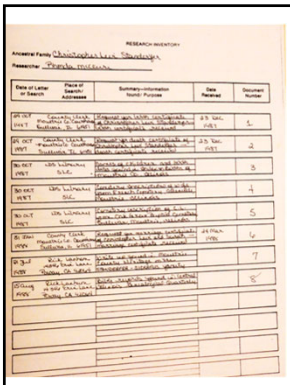


Digital Pictures in Folder

52

First Image Always the Folder

53



RESEARCH INVENTORY

Ancestral Family: Christopher Levi Standerfer

Researcher: Rhonda McClure

Date of Letter or Search	Place of Search/ Addresses	Summary—Information found / Purpose	Date Received	Doc. No.
29 Oct 1987	County Clerk Moultrie Co. Courthouse Sullivan, IL 61951	Request for birth certificate of Christopher Levi Standerfer Birth certificate received	23 Dec 1987	1
29 Oct 1987	County Clerk Moultrie Co. Courthouse Sullivan, IL 61951	Request for death certificate of Christopher Levi Stander Death certificate received	23 Dec 1987	2
30 Oct 1987	Family History Library – SLC 1311780	Names of children and birth dates found in Index to Births of Moultrie Co., Illinois		3
30 Oct 1987	Family History Library – SLC 977.3675 V224 vol. 2	Cemetery inscriptions – wife from French Cemetery, Allenville, Moultrie, Illinois		4
30 Oct 1987	Family History Library – SLC 977.3675 V224 vol. 1	Cemetery inscription of Christopher Levi from Oak Grove Baptist cemetery, Sullivan, Moultrie, Illinois		5
31 Jan 1988	County Clerk Moultrie Co. Courthouse Sullivan, IL 61951	Request for marriage certificate of Christopher Levi and Sarah – Marriage certificate received	24 March 1988	6
21 Jul 1988	Rick Lanham 14346 Erin Lane, Poway, CA 92064	Write up found in Moultrie County Heritage on the STANDERFER-SICKAFUS family		7
15 Aug 1988	Rick Lanham 14346 Erin Lane Poway, CA 92064	Bible records found in Central Illinois Genealogical Quarterly		8

Electronic Inventory

54

[eT

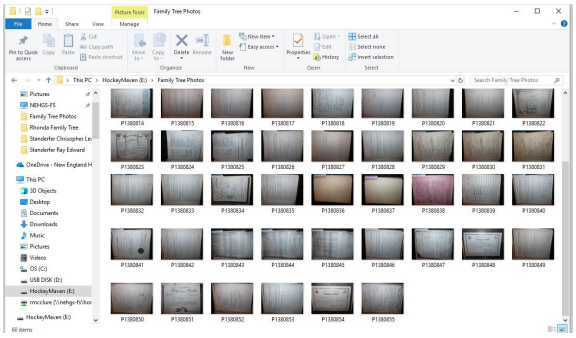
Save research logs in the family files or create a separate file

55

Combining Paper and Digital

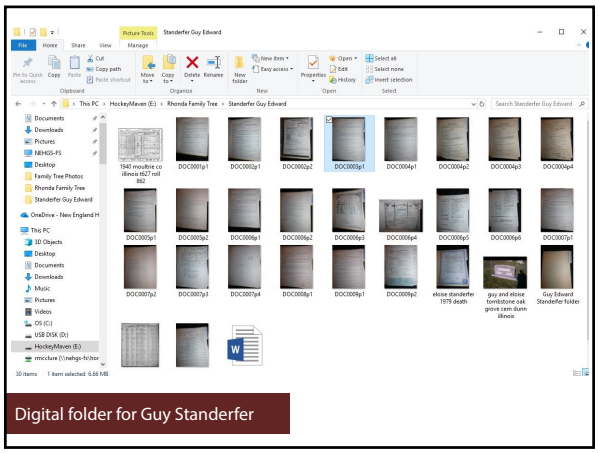
- Take digital photos of your paper files and put them in the appropriate computer folder.
- Rename the images of the documents from the paper folder to coincide with the index/inventory sheet in your paper files.
- Do this whenever you work on a family for which you have paper files.

56

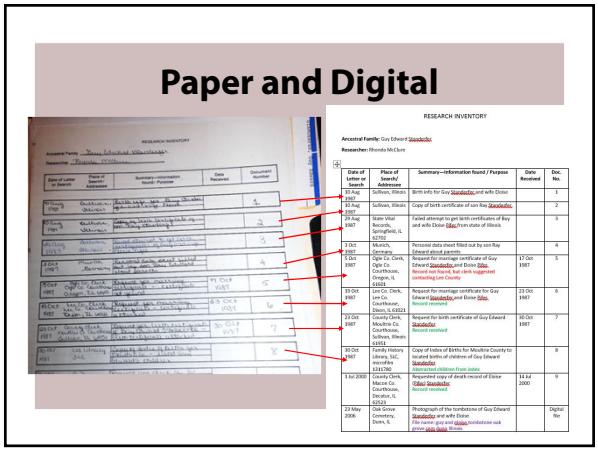


Digital Photos to be Renamed

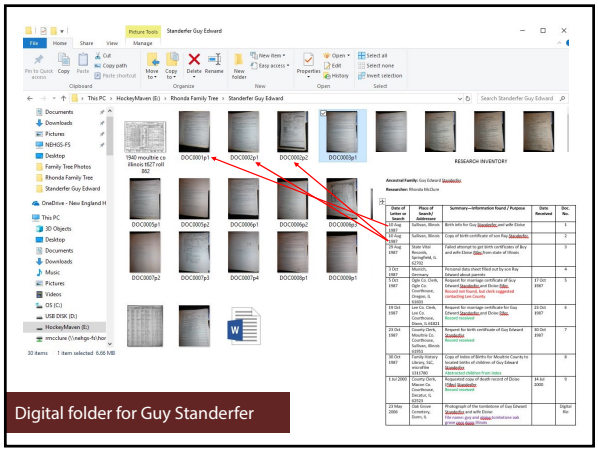
57


Standerfer Guy Edward
Digital folder for Guy Standerfer

58


Paper and Digital
RESEARCH INVENTORY

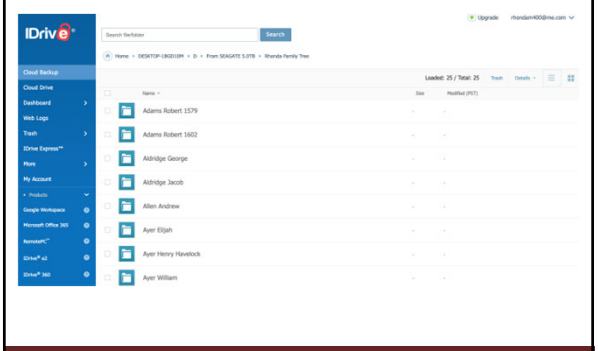
59


Standerfer Guy Edward
RESEARCH INVENTORY
Digital folder for Guy Standerfer

60

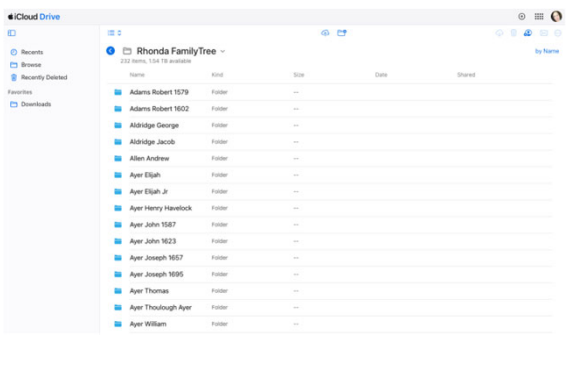
[eT
Have BACK-UP files in the cloud

61



IDrive.com

62



iCloud.com

63

64

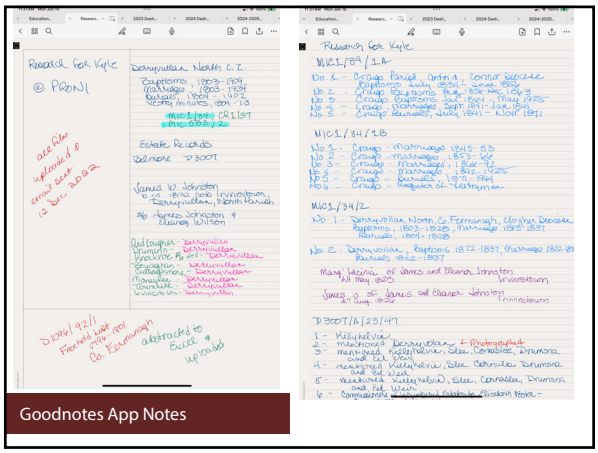
65

Research for Someone

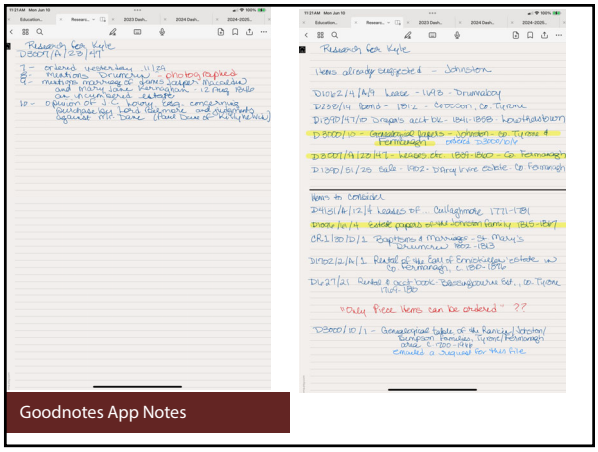
- Treat like a special project
- Be consistent
- Keep detailed notes
- Keep a copy of what you send

66

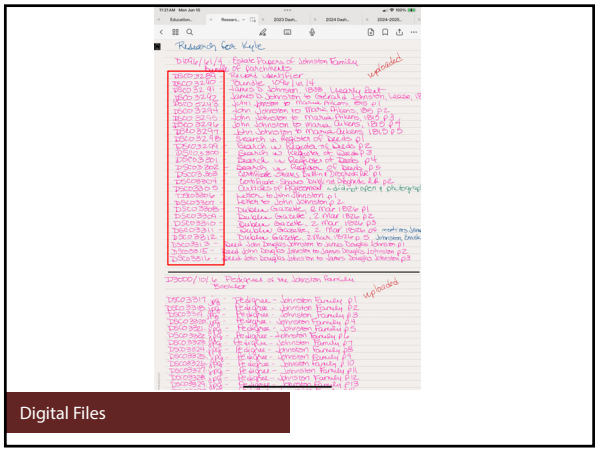
©American Ancestors; produced by The Brue Family Learning Center


Research for Kyle
Research for Kyle
Goodnotes App Notes

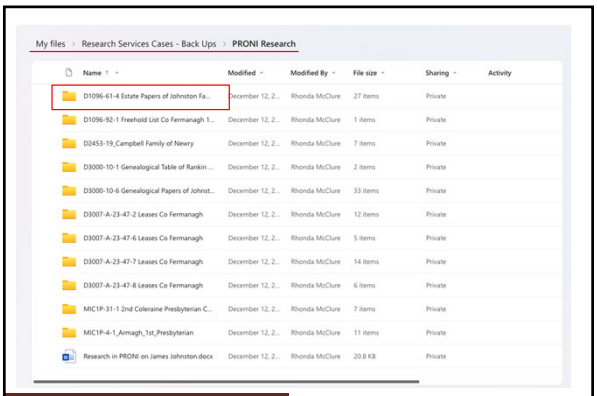
67


Research for Kyle
Research for Kyle
Goodnotes App Notes

68

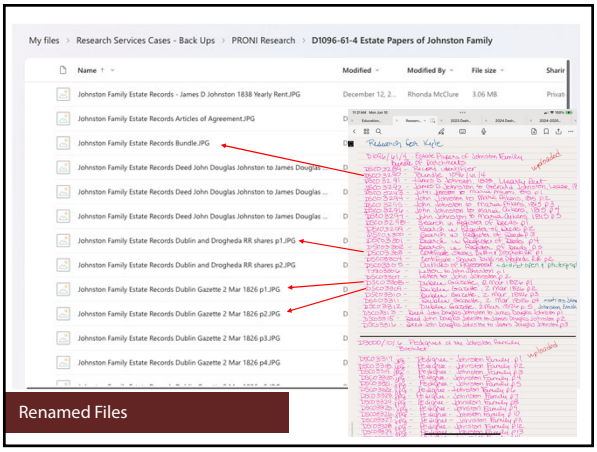

Research for Kyle
Digital Files

69



Backups of Files

70



Renamed Files

71

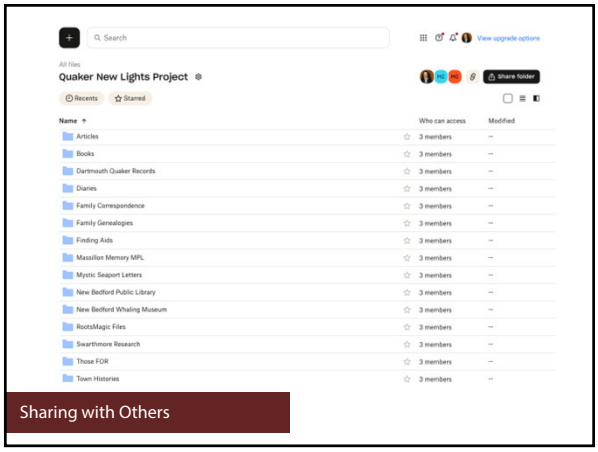
Article Research

- Assess the scope of the article(s)
- Arrange folders for different resources
  - Published volumes
  - Repositories
  - Genealogies
  - Types of records
- Access required by others

72

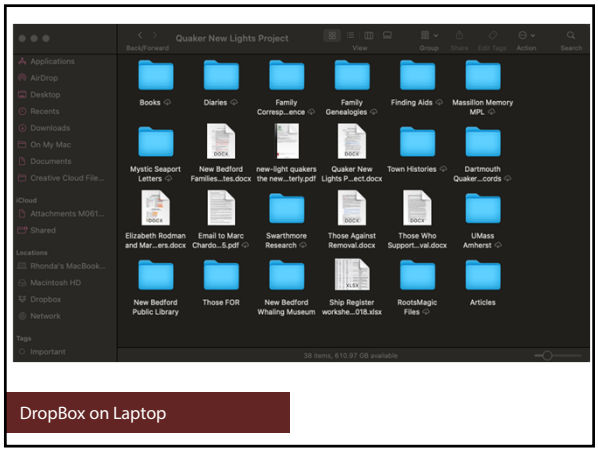
Article(s)

73



Sharing with Others

74

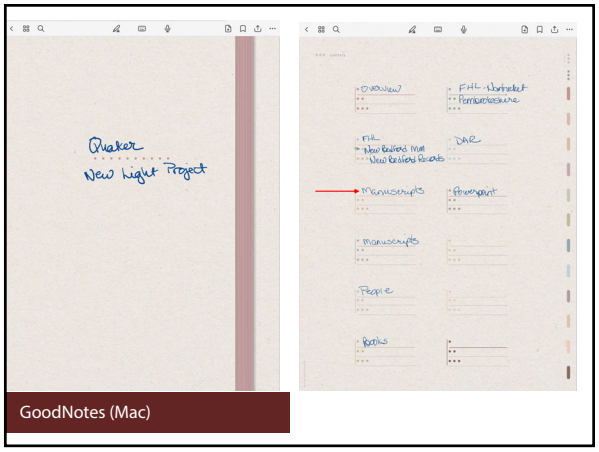


DropBox on Laptop

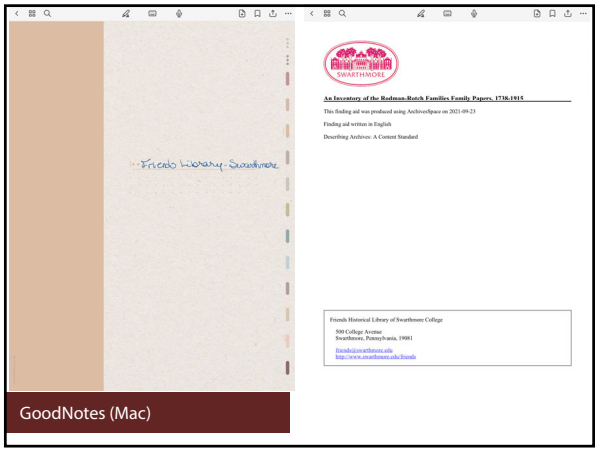
75

[eT
Track your research

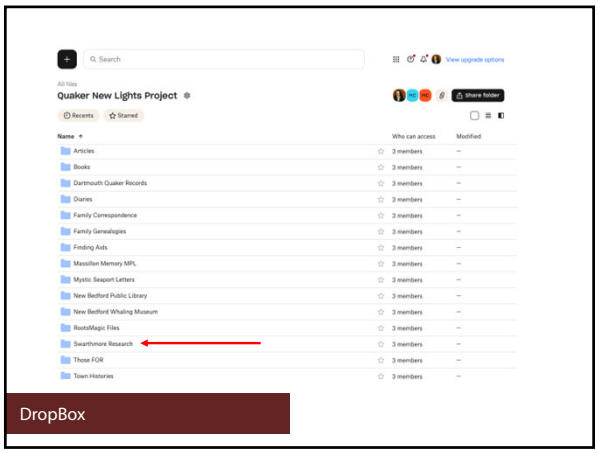
76


Quaker
New Light Project
Overview
FHL Notebook
Pennsylvania
FHL
New England MM
New England Friends
DAR
Manuscripts
Genealogy
Manuscripts
People
Books
GoodNotes (Mac)

77

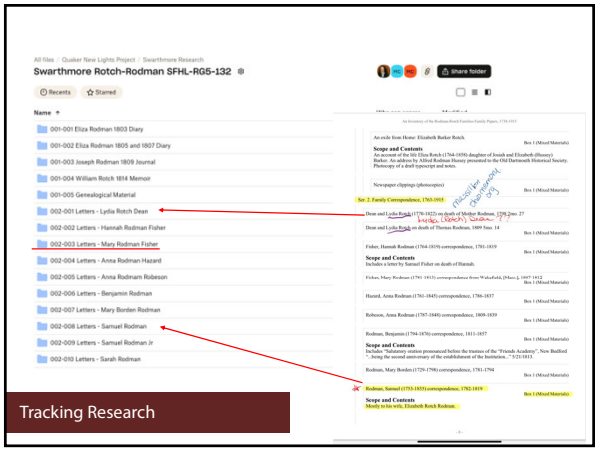

Friends Library - Swarthmore
SWARTHMORE
An Inventory of the Redman-Rutch Families Family Papers, 1738-1915
This finding aid was produced using ArchivesSpace on 2021-09-23
Finding aid written in English
Describing Archives: A Content Standard
Friends Historical Library of Swarthmore College
500 College Avenue
Swarthmore, Pennsylvania, 19081
friends@swarthmore.edu
http://www.swarthmore.edu/friends
GoodNotes (Mac)

78



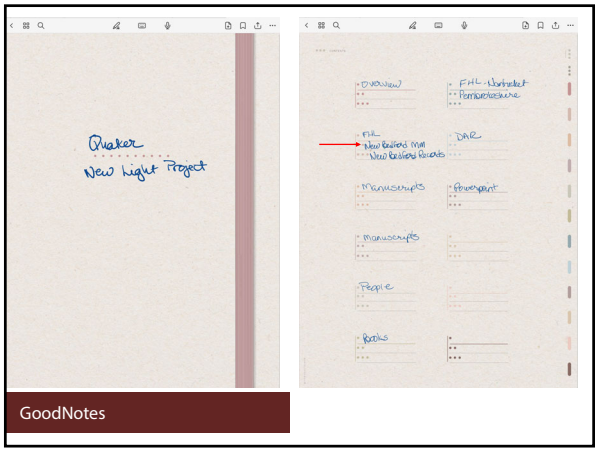
DropBox

79



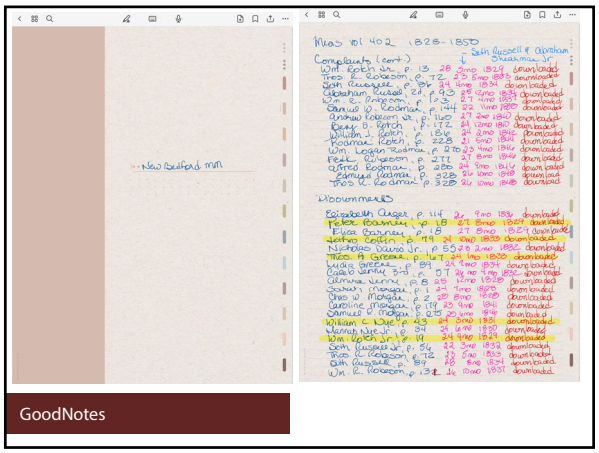
Tracking Research

80



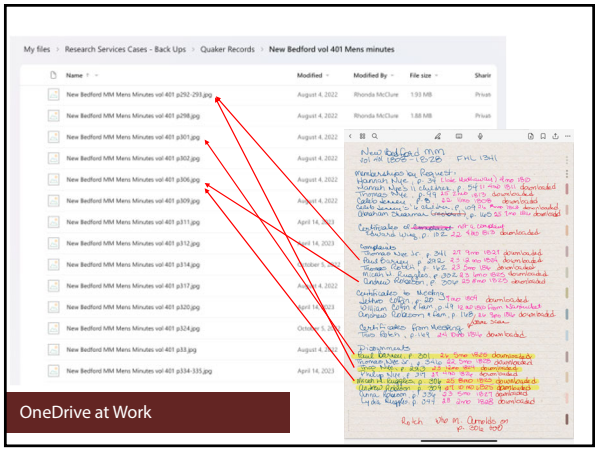
GoodNotes

81



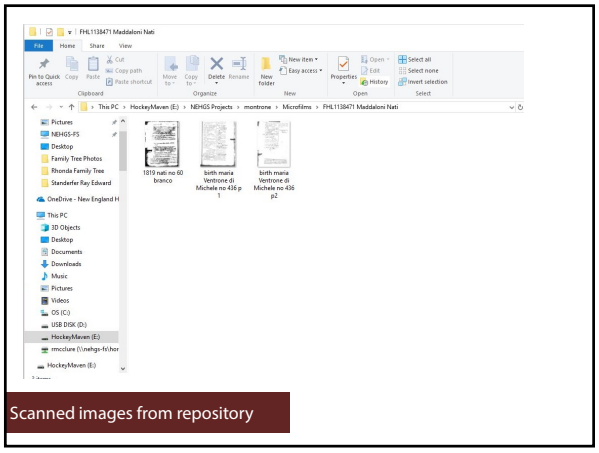
GoodNotes

82



OneDrive at Work

83

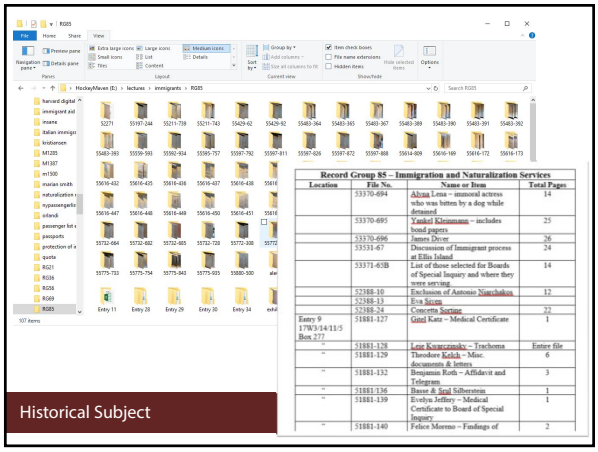


Scanned images from repository

84

Historical Subject

85



86

Active Research

87

Active Research

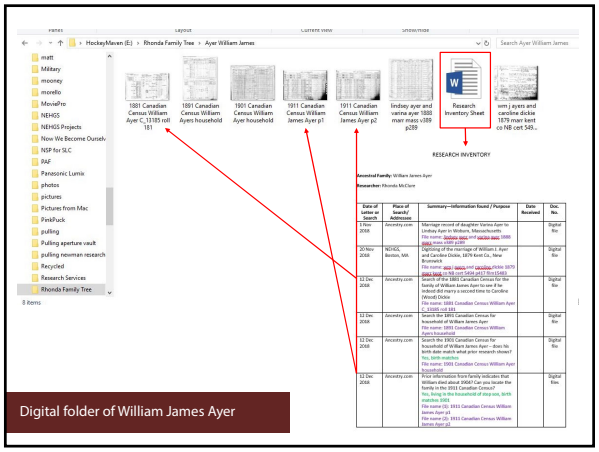
- Researching online from home
- Research trip to FamilySearch Library
- Research trip to archive/repository

88

Online Research from Home

- After downloading image:
  - Rename immediately
  - Move to appropriate folder on computer
  - Make note in research log or folder inventory
- Don't download lots of images and then go back to rename
- Rely on info of online site for source citation

89



Digital folder of William James Ayer

90

FamilySearch Library

- Access to digitized images not available at home
- Computers with microfilm scanners
- Book scanners
- Digitize negatives, etc. in Memory Lane

91

FamilySearch Library

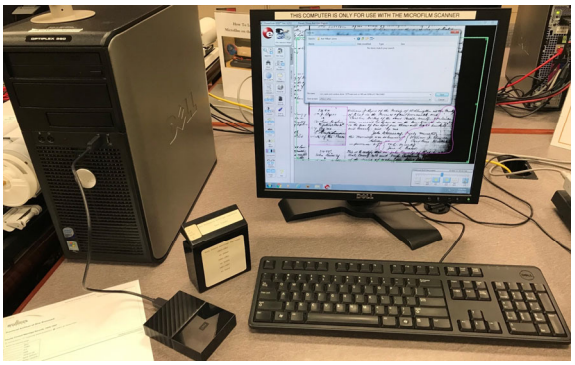
92

Keep in mind

- What you are digitizing
- Scanners save to computers attached
- Files need to be moved to thumb drives
- Name files so you know what it is

93

©American Ancestors; produced by The Brue Family Learning Center



Scanning from microfilm

94

Archives/Repositories

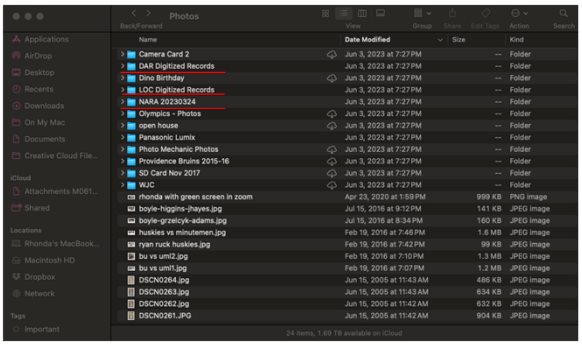
- What are the digital options?
  - Digital camera allowed?
  - Scanner on site?
  - Document scanner allowed?
- How long is the trip?
- What are you taking?

95

Archives/Repositories

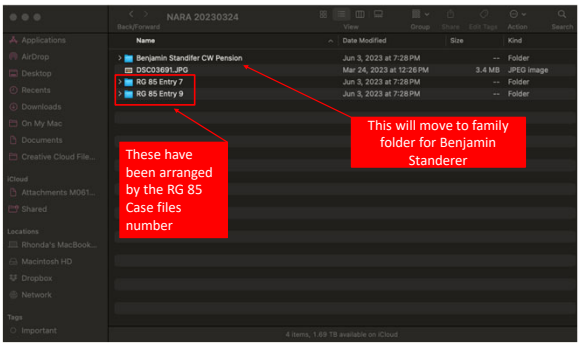
- Have goals and a research plan
- Name files so you can identify them when you return home.

96



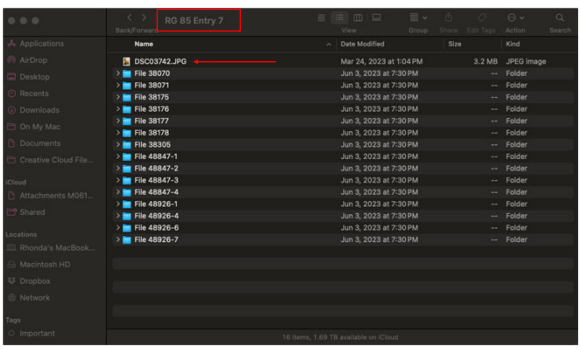
Identifying Repositories

97



NARA 20230324 Folder

98



NARA Folder --> RG 85 Entry 7

99

Hollinger Box Image

100

Keep in mind

- Different projects may need different digital structure
- Keep research logs and folder inventories
- Digitize your paper files as your work on your families
- Move thumb drive files to computer nightly when traveling (so they can get backed up)

101

QUESTIONS?

Schedule a consultation
consultations@americanancestors.org

Hire Research Services
research@americanancestors.org

102

Consultations
Book a one-on-one consultation with a genealogist and receive help with your family history research!
AmericanAncestors.org/ Expert-Help/Consultations
SCAN ME

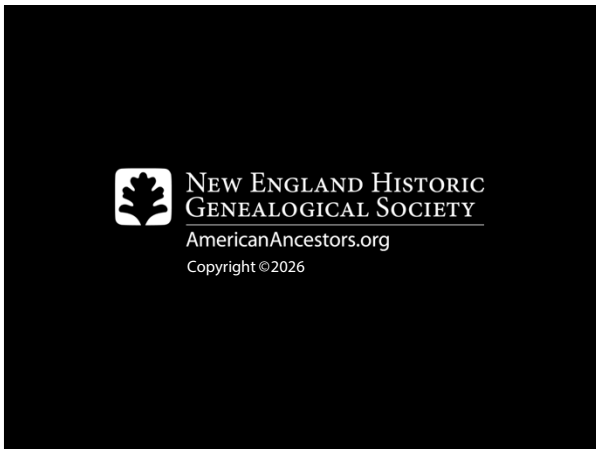
103

American Ancestors.
A National Center for Family History, Heritage & Culture
Bookstore
About Us
MY ACCOUNT
Search
Events
Join/Renew
Give
10 Million Names
Publications
Expert Help
Tools
Projects
Centers & Initiatives
Getting Organized: Research, Files, Findings 2026
Thank you for registering for the online course, Getting Organized: Research, Files, Findings!
When you first began your family history research, you may have thought that it would be simple to keep track of all the information. Assuredly, you quickly discovered that it's not so simple–files and findings multiply exponentially. Staying organized is an important part of the genealogical process. Taking the time to organize your research, results, and files as you go will give you more time for productive research. This online seminar will provide you with several tips, tools, and best practices for organizing your research and results at every step of your family history journey.
This course includes exclusive access to five 90-minute lectures, handouts, and other resources. You will have access to all course materials will be available for the foreseeable future.
JOIN THE LIVE BROADCASTS
Click here to join the live broadcasts: https://zoom.us/j/97286743539
Tuesdays, January 6, 13, 20, 27, & February 3, 6:00-7:30 p.m. Eastern Time.
If you are unable to attend the live sessions, you will be able to view recordings on this course page.
COURSE TOPICS
January 6 - Class 1: Organizing Your Research
Presented by Rhonda R. McClure
AmericanAncestors.org/getting-organized-research-files-findings-2026

104

THANK YOU!
AmericanAncestors.org

105


New England Historic
Genealogical Society
AmericanAncestors.org
Copyright ©2026

106