

Organizing Your Digital 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 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.

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 the genealogist maintain and manipulate their 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: 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.

Notebook software: Computer apps such as Microsoft OneNote, Adobe Acrobat (paid version), and Joplin offer 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, Notability, and Evernote 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 Your 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 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 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.

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 then 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

A special project might be something like a one-name study, research surrounding a historical event, or research for writing an article. In some instances, you may be offering to do some research for a friend who cannot visit the repository you are traveling to.

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 depend on if 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 will be 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, it is best after downloading an image or file to rename it immediately and move it to the appropriate folder on your computer. If you are keeping research logs or folder inventories, then 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, which can also be of use to you.

If you are traveling to archives or other repositories, be sure to 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 the newer document scanners that sit on the table and hook 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 is the best time to work with the images because the work is fresh in your mind.

Keep in Mind

Different projects or research approaches may require different digital organization. Regardless of how you are arranging your folders, it is always a good idea to keep research logs or folder inventories. When you begin to research a family that you have paper files for already, that is the time to digitize them. Also,

if you are traveling, it is best to move the files from the thumb drives or camera cards each evening. When you are moving them, take a moment to ensure that they are all readable. After all, you don't want to get home and find that the images are blurry. Additionally, loading them onto your computer and uploading to your backup cloud sites ensures that you have them, should you misplace the thumb drive or leave it in a computer on your last day and not have a way to get it back.

Bibliography

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