

Where Did I Put That?: Organizing Your Genealogy Research

Why Should We Organize Our Information?

- Access: It will help streamline your research process
- Preservation: Once information is found, it should not be lost again
- Clear up clutter
- Story Telling
- Further your research: It will make clear what has been found and what holes will still need to be filled.

General Guidelines for Organization

1. Keep it all in one place
2. Figure out what you need to organize
3. Pick out a system that works best for you
4. Write the citation on every item that you have
5. Deal with your backlog
6. Maintain your system regularly

Organizing Your Mind

- Use your time wisely
- Set a timer so you can stay on track
- Work on one to three small projects at a time, three to six extended projects
- If you see a Bright Shiny Object, put it on a project list to work on in the future
- Set manageable goals and commit to finishing them
- Plan your research strategy before you start
- Write a mini-research report for each research session and review that log for that project or for other projects that you are stumped on.



Organizing Offline

Not all organizing has to be done on a computer. Oftentimes, it is easier to organize while holding the objects in your hand. Online or offline, find a system that will best serve you as you research AND that will help you preserve what you found.

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<u>Object Type</u>	<u>Do</u>	<u>Do Not</u>
Documents	<ul style="list-style-type: none"> ● Protect them from the elements ● General rule: if you are comfortable, so is your document ● Paper needs to breathe, so avoid sheet protectors that are not archivally safe ● Store newspapers separately 	<ul style="list-style-type: none"> ● Laminate ● Tape ● Staple ● Use metal paperclips
Graphic Organizers	<ul style="list-style-type: none"> ● Consider using: <ul style="list-style-type: none"> ○ Family Group Sheet ○ Family Tree Chart ○ Research Log ● Backup the information ● Continue updating 	<ul style="list-style-type: none"> ● Use a form that doesn't work for you; if you don't find a form that you need, create one!
Photographs	<ul style="list-style-type: none"> ● Write with pencil on the back. <ul style="list-style-type: none"> ○ Filmoplast is an archivally-safe tape that you can put on photos and write on the back with pencil. ● Digitize the photos as a TIF file instead of a JPEG for better results ● Fill out the metadata on the photo files on the computer <ul style="list-style-type: none"> ○ Photo folder→ right click once on the icon→ open up 	<ul style="list-style-type: none"> ● Do not touch the front of the photograph with your fingers. Only touch the sides, if possible. ● Do not use the photo albums with sticky backing. ● Do not digitize and store in just one place

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	properties→ advanced properties <ul style="list-style-type: none"> ● Follow the document suggestions. 	
Books	<ul style="list-style-type: none"> ● Store books upright ● Grab book by the spine ● Keep away from the elements ● Fragile books should have their own box <ul style="list-style-type: none"> ○ Purchase through www.hollingermetal.com 	<ul style="list-style-type: none"> ● Store flat ● Grab by the top
Ephemera	<ul style="list-style-type: none"> ● Follow the guidelines for documents and pictures 	
3D Objects	<ul style="list-style-type: none"> ● Photograph and catalog the items to explain its meaning ● Put clothing in boxes ● Store in an appropriate box <ul style="list-style-type: none"> ○ Purchase through www.hollingermetal.com 	<ul style="list-style-type: none"> ● Shove it into a box where it can get damaged ● Clothing on hangers

Items to Help Organize

- | | |
|--|---|
| <ul style="list-style-type: none"> ● Bankers boxes ● Hollinger boxes ● Acid-Free folders ● Colored file folders ● Binders | <ul style="list-style-type: none"> ● Acid-free envelopes and photo sleeves ● Pencils ● Bullet Journal
(www.bulletjournal.com) |
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Organizing ON the Computer

Resource accessibility is becoming much easier through computers and internet access. We can write librarians and archivists, we can search digitized documents and newspapers, and we can store and distribute our findings easily. In order to be successful at integrating computers with our genealogical research, we must be able to organize our computer files efficiently.



Files

General guidelines

- Be consistent!
- Organize your folders by surname, then by first name, then dates
- Organize the women in your folder by maiden name with married name in parentheses
 - o **Example [each of these is their own folder nested under the surname folder]:** Arness
 - Arness, Gustav A. (1902-1964)
 - Quamme (Arness), Irene V. (1906-1960)
 - Arness (Peterson), Adelaide C. (1928-2011)
 - Arness (Keith), Geraldine I. (1930-)

Folder Marker (foldermarker.com) FREE

- Can change your folder icons with two clicks
- Has to be used on PC or on Mac, not on Google Drive

Google Drive lets you change the colors of the folders

- Right click once on a folder → Change color

Spreadsheets

Spreadsheets can help you see the holes that you need to fill. They are custom-made to what you need and how you process the information.

Things you can do with a spreadsheet:

- o Transcribe census records, vital records, other standard forms
- o Can organize your index of individuals on a spreadsheet
- o Can have multiple tabs in one spreadsheet document

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Computer Family Tree Maker Software

Family Historian \$64.95 www.family-historian.co.uk	Roots Magic \$29.95-39.95 www.rootsmagic.com
Reunion \$99 [for Mac users ONLY] www.leisterpro.com	Legacy Family Tree Maker Free OR \$34.95 www.legacyfamilytree.com

Plan for the Unexpected



While we are thinking in the past, we need to think ahead for the unexpected. Ask yourself the “what if?” questions about what could possibly come up along your journey. Protect your hard work and your treasures by being prepared.

Expanding needs

- Space for more cabinets or boxes
- Room for larger or more binders
- Enough memory on your computer
- Is your numbering/naming system expandable?

Natural disaster

- Make a “What if?” plan
 - What would you do if there was a fire?
 - What would you do if there was a tornado?
 - What would happen if your basement was flooded?
- What storage options have you chosen for your objects and paperwork
- Evacuation plan
 - Priority list
 - Secure things left behind

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Technology malfunction or crash

- Hard copy and digital
- External back-ups
 - Send it out to family
- Internet back-ups
- Cloud back-ups
- Which would be best for you and your data?

Your Legacy

- Distribution of data
 - Other researchers
 - Interested family
- Bequeathing your collection
 - Lineage societies
 - Genealogy organizations
 - Local libraries/societies
- Think early about what is going to happen
 - Leave it to a library or local history repository

Helpful Links

- Ancestry.com tracker sheets: <http://www.ancestry.com/download/charts>
- Family Tree University:
<http://www.familytreemagazine.com/articlelist/research-toolkit>
- Family Tree University Free Forms:
<http://www.familytreemagazine.com/FreeForms>

Have you been researching for years and you are still hitting brick walls? You might have the answer within your own artifacts without realizing it.

Check out Thomas MacEntee's Genealogy Do-Over Project:
<https://genealogybargains.com/genealogy-do-over-start-here/>

Free 13-week boot camp to prepare you to break down brick walls!

Eleanor O. Brinsko, MLIS
eleanor@carlongenealogy.com
Carlton Genealogical Services, LLC
www.carlongenealogy.com

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