
Organizing (and Staying Sane with) Your Genealogy

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My research is so “stop and start,” how can I stay sane and not retrace my own steps? Should my work be digital or paper? How do I take control of all this “stuff?” Will my research live beyond me?

As researchers we all share many of the same challenges—and this talk was prepared to help tackle some of these issues. The specific methods and tips were drawn from 20 years of running my business—which relies on our ability to organize, find, and collaborate on files. Much like research.

1. Think beyond today

Family trees are personal—but source material is universal. Whether you are doing research for your family, clients, or to donate to a local genealogical society, think beyond today. Specifically:

- **Avoid bundling original resources inside of software**—Software changes, operating systems change, companies go out of business, and storage media evolves. (Remember floppies? Zips? SyQuest?). Plan for your research to live beyond today’s technology by using a simple file and folder structure and stay current with operating systems and software. Don’t let yourself get more than two versions “out” or you may find yourself unable to read your own files!
- **Pick software that is so ubiquitous that the world could not live without it**—For example, if Microsoft Word or Adobe Acrobat were to disappear tomorrow, you could be sure that other companies would immediately start selling software that could read Word Docs or PDF files. When you have a choice, opt for “tried and true” software solutions.
- **Scan images in the highest quality you can and save in TIF format**—Scanning original photos and documents expose them to potentially harmful light—so if you are going to scan them, do it once and at the absolute best quality you can. (See scanning cheat-sheet.)
- **Download when you can**—Many commercial research sites allow you to download a digital copy of the document—look for the “Save to Your Computer” option. If you are looking for digitized documents from the National Archives (NARA), start with the list of NARA’s digitization partners which includes links through to the online collections. (Note that some may be subscription services but all are free from any NARA location.) <https://www.archives.gov/digitization/digitized-by-partners.html>
- **Save web pages as PDFs**—Most computers have the option to “print” a page to a PDF document. By saving web pages in PDF format, the text will be completely searchable and the links on the page will be live—meaning that when you click on a URL in the PDF, it will take you to the live web page.
- **Draw inspiration from the past**—Wonderful examples of how to organize family information can be a near as your local genealogical library. Draw inspiration from traditional methods of organizing and annotating research and numbering systems.

2. Be ruthlessly consistent

When processing your research, whether paper or digital, consistency is your friend. Employing a consistent way to manage files, create notations, develop checklists, process what you have gathered, and a way to file and share it, can make all the difference between enjoying your discoveries and feeling overwhelmed.

The good news is that “common sense” is going to be your new best friend. You don’t need fancy software or an expensive self-help book, you just need a plan.

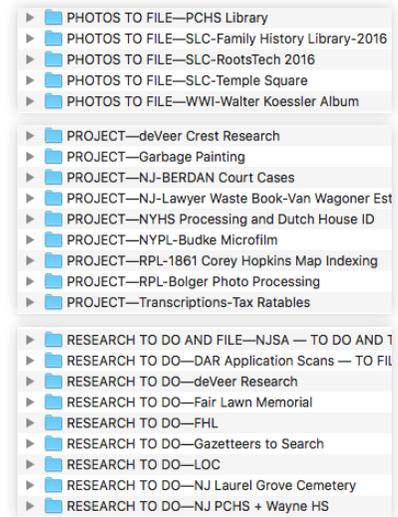
Processing—start at the source

How many times have you been in a repository, printing out frames from microfilm, and have thought to yourself “I’ll remember what that is.” But between the archives and finding the time to read through and process the materials life intervenes. And by the time you get back to what you’ve collected, you’ve no idea what you’re looking at. You’re not alone. Make careful and complete notes as you go—write your sources on your printouts as soon as you print them—don’t wait to get home to remember where it came from.

Set up in-boxes and/or folders so that everything always has a place

No one expects you to do your family tree all in one go—you need to prepare for the stops and starts that happen. Help yourself and save your sanity by setting up in-boxes, whether digital or paper, so you always know where you left off and what’s next to do. Some examples of in-boxes or folders:

- **To Be Processed**—Materials not yet read or mined for information
- **To Be Filed / To Be Scanned**
- **Needs Follow-Up / To Do**—Don’t neglect your thoughts on where to go next, create a safe place where your next steps reside
- **Wrong Person / Family**—Negative information can be as valuable as correct information when you are dealing with family members who have similar names or followed traditional naming patterns. Keep your “wrong research” so you don’t retrace your steps!



Naming can help you stay organized

Documents = Discipline

You will have far more documents and files than folders—so how you name them will be far more important than any other part of your organizational system. Be ruthlessly disciplined and the rest will be easy.

Whether paper or digital, how you name your research can help you stay more organized, form the foundation for your citations, and make files easier to find so you don’t duplicate your research work.

- Err on the side of being comprehensive and using common sense with your naming. The more detailed the name, the easier it will be later to cite the document, or for someone else (whether a researcher or a family member) to understand what they’re looking at before they even open the file.
- Most computers allow for up to 256 characters in a file name—so use them! You can use CAPS, spaces, numbers, hyphens, parenthesis, ampersands, commas, dashes, any character, except “ * : / \ ? < > | .” (Remember that your mileage may vary due to your computer’s version of operating system.)

So, what does 256 characters look like? This:

There’s no reason not to be incredibly descriptive with your file names—you can use CAPS or Upper and lowercase, add dates, and even use (these)—so the basis of your file name can form the basis of your citation, saving you headaches down the road, wow.doc

- When you name following the “wedged system” (next page) digital files will sort automatically—with related items sorting right next to each other. Let the naming do the sorting for you!
- Note that if your research files are date sensitive (for example, a series of court records in a research folder) listing date first allows them to naturally sort in chronological order.
- If the original file has a unique identifier, such as an image number, it is best to preserve the original file name as part of the file name. I usually keep any original file name at the end of the name in the “Anything else?” portion of the name.

Wedged File Naming Structure

Most common attribute

Most unique attribute

Who is this about? - **What is this about?** - **What is the source/reference?** - **Anything else?**

DEMAREST FAMILY-Foreclosure (1 June 1844)-New York NY Tribune (1843-1844)-Page 001.jpg

Demarest, David-1930 US Census-NARA-Ancestry ED201 Page 12A-4660853_00028.jpg

DEMAREST, REV JOHN-1829 NYC Mortgage Partnership-NYC Records L247 B296-298-OCR.pdf

DEMAREST, REV JOHN-Pension R2860-NARA Rev War Pension Files M804-ALL PAGES.pdf

DEMAREST, REV JOHN-Snuffbox-NY Tribune (1821)-GeneBank pl_009052011-HIRES.pdf

Sample of a date-sensitive naming structure

1781-BERDAN, JACOB-State vs Blanchard-Appeal-NJSA Docket 34000-Transcription.docx

1787-BERDAN, JACOB vs Merselles, Edo-Trespass-NJSA Docket 24325-Page 001.tif

1787-BERDAN, JACOB vs Merselles, Edo-Trespass-NJSA Docket 24325-Page 002.tif

Digital folders = Flexibility

How you organize folders can evolve with your research process:

- Name your folders to reflect the research you need to do and how you like to work
- Set up a few “catch-all” folders to store items that are larger than more than one category
- Experiment with adding underscores and/or numbers to the start of each folder name to keep them in an order that makes sense to you
- Remember that it is easier to change the order of the folders to reflect the system you want than changing the names of the files contained within the folders.

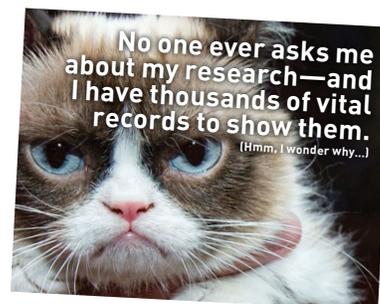
3. Protect and share your work

“How much should I spend on my backup system?” is not the right question. Think for a moment about your computer’s hard drive dying or a fire in your home—and then think about how much you would PAY to someone if they could reverse time and get your files and family documents and photos back. The amount that came to mind is how much you should invest in protecting your research.

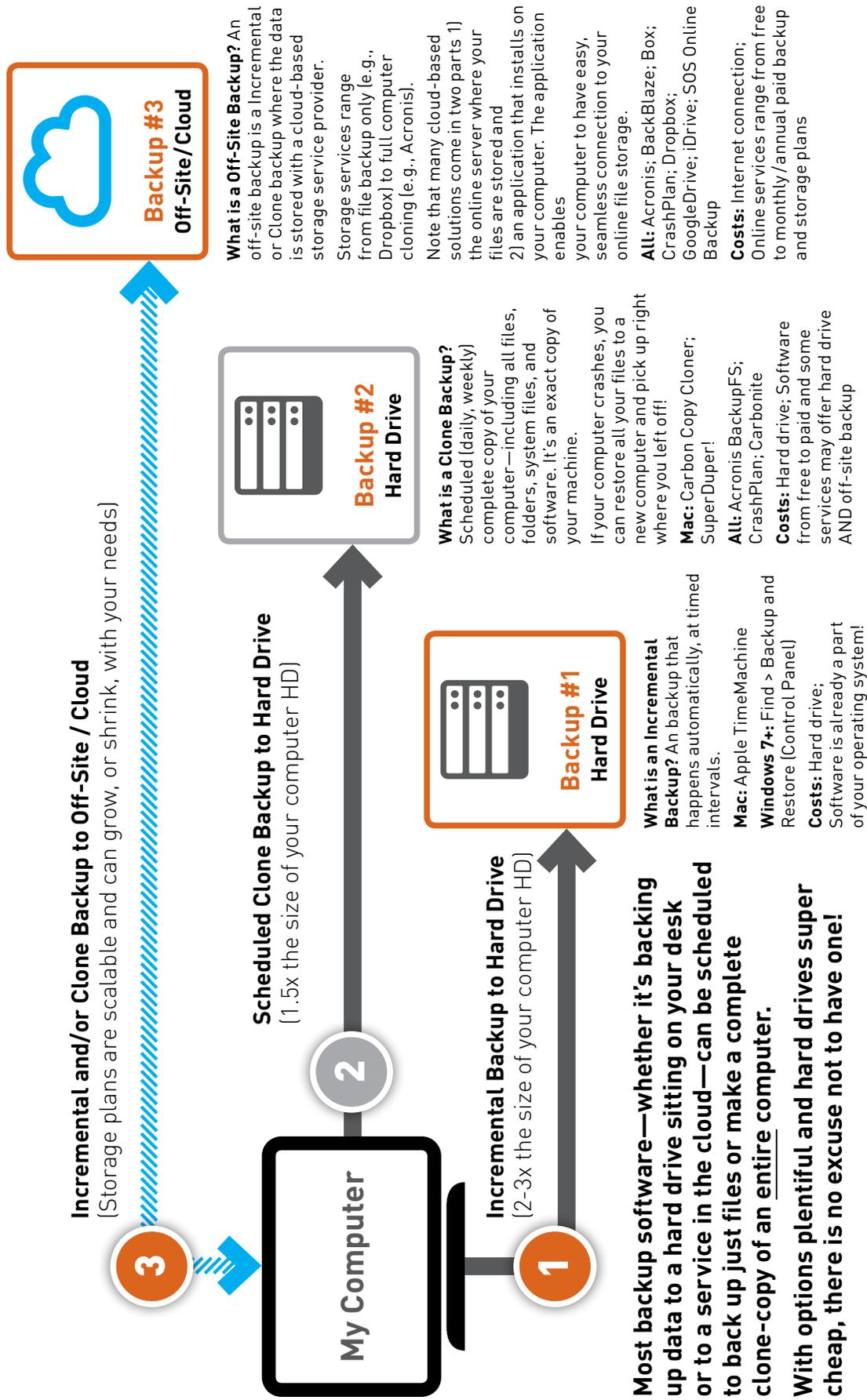
The good news is that hard drives, off-site “cloud” storage, and water- and fire-proof boxes are inexpensive compared to what they were just a few years ago. In addition, many retailers, including craft and big-box stores, now sell archival materials, great storage options, and computer drives.

Engage family members in helping with costs to buy archival materials, external backup drives, or share your files and photo scans with them through an online file-sharing solution. Involving your family is a great way to share your passion, and their family story, with them.

- **Display and materials inspiration** = [Pinterest.com](https://www.pinterest.com)
- **Genealogy color-coding** = www.GenRootsOrganizer.com / TreeSeek.com



3-2-1 Backup = 3 Backups > 2 Different Media > 1 of them in the Cloud



Scanning resolution cheat-sheet

The Golden Rule = Scan original, unique materials with the highest-resolution and best quality. You can always “save as” to a lesser-resolution, smaller versions of the scan.

Type of Item to be Scanned	Resolution	Scan Mode	Why?
Facsimiles, Photocopies, and Laser Prints = Scan for Readability (OCR as well as your eyes)			
Copies of Documents, Microfilm Prints, Books or Magazine Articles, etc.	150 (Minimum)– 300 ppi (Baseline)	Grayscale, RGB, or Text Mode—whichever works best for your particular document	Scans from microfilm need only to be as legible as original. Microfilm is at least five generations removed from the original material (Original > Microfilm Master > Microfilm Copy > Laser Print > Your Scan). Shoot for a legible scan. But, if the scan has printed text, scanning it at a higher resolution may help an OCR image-to-text conversion be more accurate. Shoot for 300 ppi or higher.
Original Documents, Images, and Objects = Scan as High and as Best as Possible			
Original artifacts should be exposed to as little light as possible to best preserve them. If you are going to scan them, make sure to <u>make it count</u> by scanning them in the highest-resolution and quality as possible. In general, if an object is small, scan it in the highest resolution possible.			
Type of Item to be Scanned	Resolution	Scan Mode	Why?
Family Documents (Letters, invitations, report cards, marriage certificates, etc.)	300–600 ppi (Note that 600 ppi is standard at most Archives)	RGB Color	RGB will preserve the widest tonality of the original. You can always adjust later to make letters more legible or separate ink that has bled through a piece of paper from the writing on the other side.
Photographs The smaller the original, the larger the scan resolution.	600–1,200 ppi (or higher, some scanners go to 2–3x)	RGB Color (recommended) or Grayscale	In order to preserve the full-spectrum of tonality, black and white photographs can be scanned in RGB mode—which gives more tonal range (3-levels, red-green-blue) over Grayscale scanning (1-level, gray).
Slides and Transparencies, Print Negatives, Movie Film The smaller the original, the larger the scan resolution.	1,200 ppi, minimum; set scanner at maximum resolution— you’ll need all the resolution you can when you blow the image up	RGB Color	Many flatbed scanners are able to scan slides and transparencies. Scan slides at highest possible resolution as you will need to blow them up considerably. Print negatives can be scanned like slides and the tonality digitally reversed to make the image positive. Alternately, slides and movies can be projected and new photos or video taken of the projection.
Dimensional Objects (Needlework, badges, jewelry, etc.)	300–1,200 ppi	RGB Color	Some dimension objects may fit on a flatbed scanner or FlipPal scanner. Other can be photographed with a god quality digital camera. Some photographers will include a penny or dime in the frame to show scale of the object.

Print to PDF (save any page as an OCR-ready PDF!)

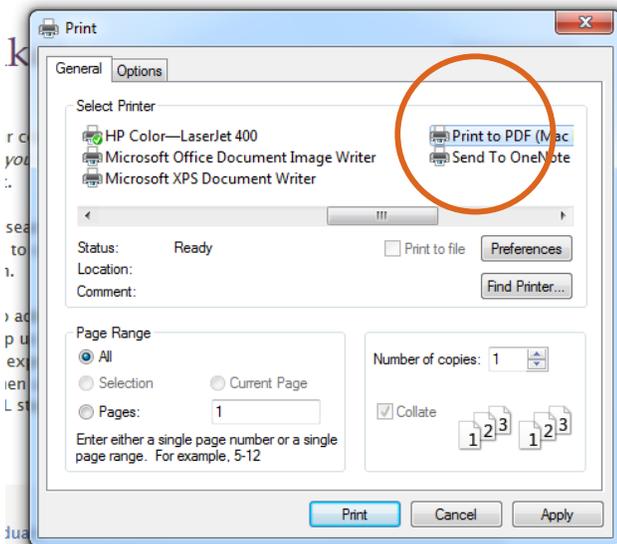
Pros

- Web links in the PDF will be hyperlinked back to live web page / web source
- Text is readable and searchable by the computer—when you do a “Find” it will find it within the document!
- Click “Print headers and footers” (or similar) to capture the URL of the page

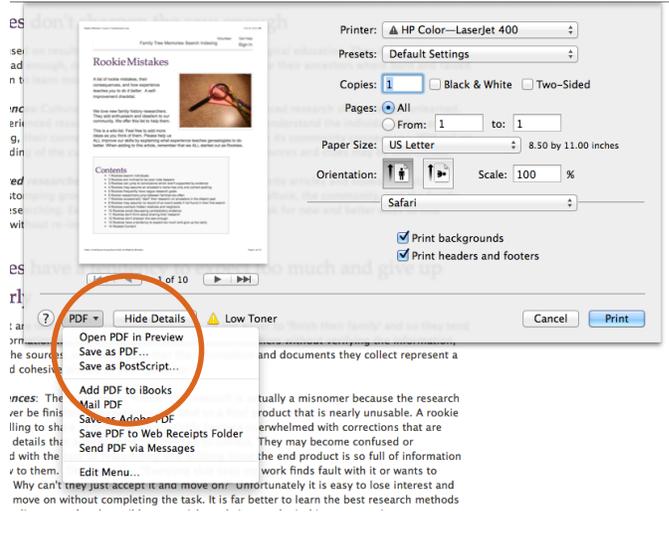
Cons

- Some pages may print or PDF very differently than they show on-screen. For these pages, it may be advisable to also capture it via screen-grab

PC—Print > Select Print to PDF (or similar)



Mac—Print > Save as PDF...



Screen-Grab Shortcut Cheat Sheet

For those documents that can't be grabbed as a PDF or downloaded otherwise.

	PC		Mac	
	Press all at once...	...then	Press all at once...	...then
Screen Grab Shot of entire screen	Windows + Print Screen (next to F12)	Paste (Command + V) into MS Word or other program (Only saves one grab at a time in the clipboard)	Command + Shift + 3	(Saves screen-grabs to the Desktop)
Screen-Shot of a Specific Window Shot of a specific window	Click the window you want to capture, OR Start menu > All Programs > Accessories > Snipping tool > Select type of snip	Alt + Print Screen (next to F12) Paste (Command + V) into MS Word or other program (Only saves one grab at a time in the clipboard)	Command + Shift + 4 +	Space Bar + Mouse Click (Saves screen-grabs to the Desktop)
Selection Grab Capture only part of a screen or window	Start menu > Snipping tool	Paste (Command + V) into MS Word or other program (Only saves one grab at a time in the clipboard)	Command + Shift + 4	(Saves screen-grabs to the Desktop)

FOLD

ANCESTOR NAME(S)—WHO IS THIS RECORD ABOUT?

.....
.....
.....
.....

REPOSITORY

RECORD GROUP / COLLECTION / MICROFILM ROLL NUMBER

RECORD NUMBER / PAGE NUMBER / IMAGE NUMBER

SCANNED

NOTES / FOLLOW-UPS / TO-DOS

.....
.....
.....
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INSTRUCTIONS

Print out or make copies of this page (preferably on a piece of color paper) and keep a small stack handy the next time you are at an Archive, Library, or other research repository.

As you make printouts or copies, use this sheet to record information and details about the record, who it relates to, as well as thoughts about next steps, related collections, or notes. When done making prints, fold the sheet in half and place your printouts inside. Since many repositories do not allow staplers or paper clips, its a great way of keeping the sheets together.

The preprinted form is intended to help guide you to create a consistent system of recording your information about the record.

Recording this information—at the time you are researching it—will make it easier to properly place it in your research. Details about where the record comes from and the specifics (record group, microfilm roll number, etc.) will inform how you write your citation for this record and help others understand where this record came from and how to find it again. Happy researching!

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