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Organizing (and Staying Sane with) Your Genealogy

My research is so stop and start—I keep retracing my steps! I'm so confused—should my work be digital or paper? How do I take control of all this stuff? How can I help my research "live" beyond me? **Sound familiar?**

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. Build repositories.

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:

- **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. (Subscription services are free at any NARA location.) **www.archives.gov/digitization/ digitized-by-partners.html** and **https://narations. blogs.archives.gov**.

- **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 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. Document everything.

How many times have you been in an archive or library, printing out frames from microfilm, and have thought to yourself "I'll remember where that came from…". You won't. And, you're not alone.

Prepare for research…

Prepare for your off-site work—bring all the tools you need to stay organized on the go, including pre-printed wrappers for printouts (see end of handout), clear folders, post-it notes, mechanical pencils, etc.

Organize as you go…

Take careful and complete notes as you research—and write your sources on your printouts as soon as you print them—don't wait to get home to remember where it came from. A few minutes of good habits will save hours of frustration later!

Write everything down

Use an electronic calendar, an Excel spreadsheet, a Google doc, notepad and paper—whatever you are most comfortable using—to make notes about what you've done, and what you need to do. Then consistently use that device as the "go-to" place for notes and next-steps.

[A primer of *Getting Things Done* by David Allen, https://lifehacker.com/ productivity-101-a-primer-to-the-getting-things-done-1551880955]

3. 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 to "work-organized."

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:

- **To Be Processed**
  Materials not yet read or reviewed for information
- **To Be Filed / To Be Scanned**
  Always ready busy-work for rainy days!
- **To Do**
  Don't neglect your thoughts on where to go next. Create a safe place to collect you thoughts and where you know you can find your next steps.
- **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 use common sense when 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, etc.
- You can use any character, except " * : / \ ? < > |.
- 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

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MY WEDGED FILE NAMING STRUCTURE

Specific "Common Sense" Naming = Easier sorting, searching, and finding. I use this on all my files!

Attribute in common ◄---► 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 01.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

BERDAN (BRAEN), NELLIE + Unknown-X-Tintype-Original Michelle Novak Collection-1200ppi ARCHIVE SCAN.tif

BERDAN (BRAEN), NELLIE + Unknown-X-Tintype-Original Michelle Novak Collection-300ppi.tif

BERDAN (BRAEN), NELLIE + Unknown-X-Tintype-Original Michelle Novak Collection-072ppi.jpg

Sometimes, it may help to change it up a little to make the sorting work for the project—like listing date first so the files sort in chronological order.

1781-BERDAN, JACOB-State vs Blanchard-Appeal-NJSA Court Docket No 34000-Transcription.docx

1787-BERDAN, JACOB vs Merselles, Edo-Trespass-NJSA Court Docket No 24325-Page 001.tif

1787-BERDAN, JACOB vs Merselles, Edo-Trespass-NJSA Court Docket No 24325-Page 002.tif

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the basis of your file name can form the basis of your citation, saving you headaches down the road, wow.doc (Your mileage may vary due to your computer's version of operating system.)

- When you name following the "wedged system" (previous page) digital files will sort automatically—with related items sorting right next to each other. Let the naming do the sorting for you!

- If your research files are date sensitive (for example, a series of court records in a research folder) including the date in the name structure may allow 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.

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.

Typical file folder names may include:

- _TO FILE
- _FAMILY INFORMATION
- 01-Birth
- 02-Life
- 03-Education
- 04-Military
- 05-Marriage
- 05-Children
- 06-Property
- 07-Death + Estate
- OLD-HOLD
- X-WRONG PERSON

4. Make it accessible.
Involving your family is a great way to share your passion, and **their** family story, with them.

Protect it
Think for a moment about losing all your work—your computer's hard drive dying or burst pipe in your home, or worse. How much you would pay 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—and you can get gift cards to use at many, if not all, of them.

At the very least, make sure to backup your computers files at level one (see chart) and protect your original documents and photos with archival supplies and fire-and flood-safe pouches and boxes. Remember that you are the curator of these materials—and that they belong to all your family.

Technology = B&H Photo, www.bhphotovideo.com

Archival Supplies = Gaylord Archival, www.gaylord.com; Talas, www.talasonline.com

Share it
Challenge yourself to create a family museum—one that is image-rich and allows your family to "see themselves" in the artifacts.

Engage family members by sharing your files and photo scans with them through an online file-sharing "cloud" service or creating a display in your home.

For younger family members, select images of your ancestors doing something they can relate to—such as fishing, driving a car, playing with pets. Document and pass-on family heirlooms as kids and grandkids become of age. Label items, put notes inside, or write with soft pencil on them.

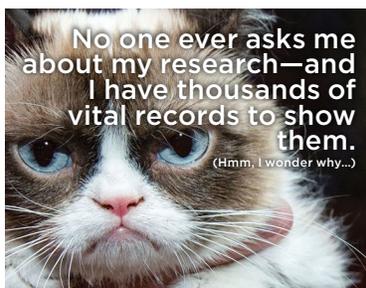Make your research colorful and fun, upgrade your files and folders to make it family-friendly.

Display and Materials Inspiration = Pinterest

Genealogy Color-Coding Systems = GenRootsOrganizer.com; TreeSeek.com

Personalized Recipe Gifts = Etsy, Amazon

No one ever asks me about my research—and I have thousands of vital records to show them.
(Hmm, I wonder why…)

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

Pros

- Web links in the PDF will be a hyper-link, and link back to web page / source
- Click "Print headers and footers" (or similar) to capture the URL of the page Text is readable and searchable by the computer—when you do a "Find" it can find the search term **within** the document!

Cons

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

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

Mac—Print > Save as PDF...
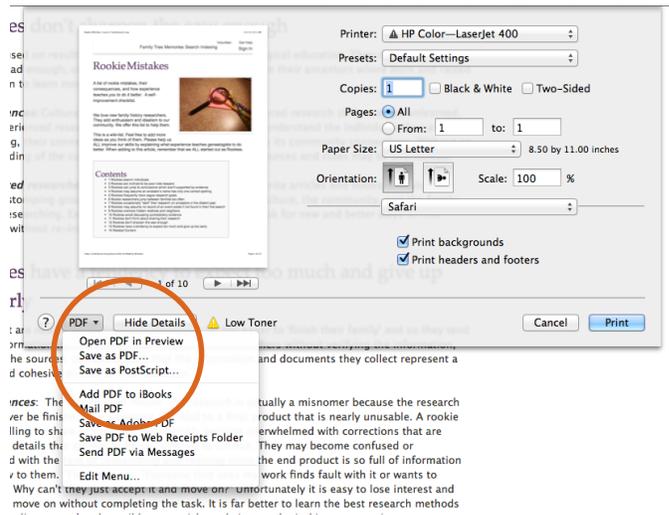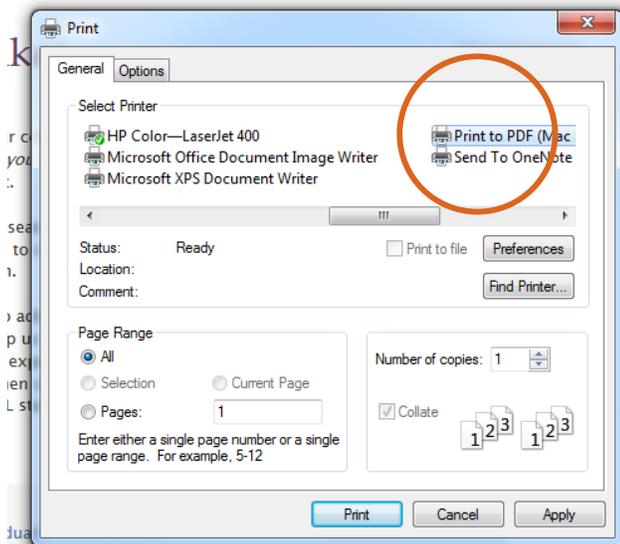
Screen-Grab Shortcut Cheat Sheet

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)

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

My Computer

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3 **Backup #3**
Off-Site/Cloud

What is a Off-Site Backup?
An Incremental (#1) or Clone (#2) backup where the data is stored with a cloud-based storage service provider.

Storage services range from file backup only (e.g., Dropbox) to full computer cloning (e.g., Acronis; Backblaze).

Note that many cloud-based solutions come in two parts: 1) the online server where your files are stored and 2) an application that installs on your computer. The application enables your computer to have easy, seamless connection to your online file storage.

All: Acronis; BackBlaze; Box; CrashPlan; Dropbox; GoogleDrive; iDrive; SOS Online Backup

Costs: Internet connection; Online services range from free to monthly/annual paid backup and storage plans

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2 **Backup #2**
Hard Drive

What is a Clone Backup?
Scheduled (daily, weekly) complete copy of your computer—including all files, folders, system files, and software. It's an exact copy of your machine.

If your computer crashes, you can restore all your files to a new computer and pick up right where you left off!

Mac: Carbon Copy Cloner; SuperDuper!

All: Acronis; Backblaze; CrashPlan; Carbonite

Costs: Hard drive; Software from free to paid. Some companies offer hard drive AND off-site backup (#3) in one package

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1 **Backup #1**
Hard Drive

What is an Incremental Backup? An backup that happens automatically, at timed intervals, usually 15 minutes.

Mac: Apple TimeMachine

Windows 7+: Find > Backup and Restore (Control Panel)

Costs: Hard drive; Software is already a part of your operating system!

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1 **Incremental Backup > Separate Hard Drive**

Buy external hard drive(s) that are 2-3x the size of your computer hard drive. Replace drives about every three years.

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2 **Clone Backup > Separate Hard Drive**

Buy external hard drive(s) that are 1.5x the size of your computer hard drive. Replace drives about every three years.

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3 **Incremental and/or Clone Backup to Off-Site / Cloud**

(Storage plans are scalable and can grow, or shrink, with your needs)