

Organizing Your Research

By Diana Smith

Finding ancestors and other relatives -that's what genealogy is all about, right? And there is tons of information out there on all of them (even if some of them intentionally seem to have made it difficult for others to track them down!). The trick is, once you've learned something about an ancestor or relative, put that information into a readily-accessible, "user-friendly" form that will help you proceed to more research.

Here are some "tips and tricks" on organizing your research. Although these methods have been tried over many years of genealogical research, it is important to realize that not all methods work for everyone. Please think about how these ideas can help you in your research and organization. If you aren't comfortable with a system, you won't use it consistently and the whole purpose of using it in the first place is defeated before you even begin. Think about your habits and preferences as you adopt the methods that are appropriate for your purposes.

This system has been found to work best when all the pieces are combined -the proof files, surname files, the "portable" files, and computer files. When putting together your system (or revising your present system, please consider carefully before "skipping" any of these areas-I'll explain the reasons as I go along.

1. Proof files. These are the originals (or master copies) of all the information you accumulate. Examples include birth certificates, marriage licenses, death certificates, photographs, copies of pages from secondary sources, correspondence, and so forth. These documents should never leave home!

2. Surname files. These are your working copies of the proof files, plus any notes on possible connections, ideas on which to follow up, and other similar things. These may go to the library or courthouse with you as needed.

3. Portable files. These contain the master information on ALL your ancestors and it goes with you 100% of the time. This should include copies of all your pedigree charts, family group sheets on all direct (or 1:1000 line) ancestors, and other quick-reference aids.

4. Computer files. These files include details and source information on all of the individuals you are researching -not just blood relations, but spouses, children, ancestors of in-laws, and other relatives. It may even include "possible" relations. This does not replace any of the other four files identified above! There are places you cannot take your computer (even a laptop). The proof files are the actual documents or copies. The surname files contain hard copies of the information in the proof files (more detail than you can put in the computer -and who would want to key in everything you find anyway?) The computer does, however, provide a valuable resource for sharing information, and for organizing data. It's helpful in determining relationships -the connections can be made one by one and the computer will show a graphic representation of the relationships. It's also extremely helpful to be able to print out a family group sheet or pedigree chart or better yet, a GEDCOM file) to share with a relative (or possible relative)

As you can see, each of these types of files has its own function; and used together they will keep your data in accessible, usable form!

Before beginning on the types of files, there are two overall bits of preparation you need to do:

- Prepare a pedigree chart (probably a "cascading" pedigree chart) showing all known ancestors. I recommend you start with your children, so that you and your spouse do not have the same identification numbers for different ancestors.
- Number the ancestors according to the "ahnentafel" numbering system. The ahnentafel system, by its nature, provides a unique number for each individual ancestor, while allowing you to easily see where there are gaps in your information by seeing which numbers you have not assigned. (The first individual I recommend your children as a group -is assigned #1. The father of each individual is double the child's number, and the mother is one more than the father. So the father of person of #1 is #2, and the mother of person #1 is #3.)

Once these tasks are completed, you're ready to begin organizing your data.

Type 1 -Proof Files

The key to keeping your Proof Files organized is having a system for identifying each family group to keep the data separate but accessible. Keep these files by surname (for marriage records or information pertaining to the wife, try to keep two copies -one with her father's family, one with her husband). If you find that a particular file is becoming too cramped, separate them by generation, labeling each file with the identification numbers of the parents (the ahnentafel numbers assigned above).

Also this file includes the abstracts of censuses, deeds, wills, and so forth that you have made. You should keep copies of the same documents in your Surname File.

Take care of your original proofs. Use good preservation methods for old documents and photos; handle them carefully; use acid-free paper on everything possible. Make copies of whatever material you think you may need to take along when researching. DO NOT take along your originals! You've heard people say, "I know where it came from, I can always request another copy." But the horror stories pop up frequently of courthouses that have lost all the records from a particular period -or worse, a fire has destroyed everything; or laws change and those documents are no longer available to the public or for genealogical research! So even if you know where a document came from, and you have all of the information, you may not be able to get another copy. Keep your originals safe!

Type II -Surname Files

The Surname Files are your working files. These are arranged by surname so that you can take this file with you when you are researching a particular name. These files should each contain as much of the following as you have available for each surname:

Part I:

- an ancestral time line to ensure that your generations overlap properly, and to see at a glance which ancestors were living at any given time;
- pedigree charts for the surname; and
- a correspondence log and copies of correspondence.

Part II (beginning with the most recent generation in the front):

- a family group sheet with enough pages to include all children;
- a research record where you have checked and what you have found, so far;
- copies of material from Proof File; and
- generation dividers/notes.

These, then, are the files you take along to do your research, or in which you make notes of "things to do" or possible connections. Your originals are protected, but you have a handy reference available with all the detail on a given family.

Type III -Portable Files

When you are going to do research, you will want to take along your Surname Files for the family or families you're planning to work on. But what if you find someone else for whom you don't have a file with you? You may start out intending to research only one particular line, but discover that it seems like that family is "hiding" -or another family pops up where you weren't expecting to find them! Without your Portable File, you may end up with files of research on individuals to whom you are not related!! The names and places may be right, but the family turns out to be cousins or sometimes not related to you at all!

The purpose of the Portable File is to enable you to take enough information with you to be sure that the family you've found is one you're looking for. It should include your pedigree charts, a location directory (so that *you* can double-check to see if you have ancestors in a particular town, county, or state for which you've found Vital records), alphabetical listings of surnames of interest, family group sheets, and other notes.

The family group sheets should contain the basic information (birth, marriage, death, burial) with dates and places. It's easier if everything is cross-referenced by both surnames (husband and wife), so if you run across information on a Susie BEEDLEBUB, you don't have to remember who she married to find her -she's right there in the Bs, along with all her BEEDLEBUB ancestors.

Type IV -Computer Files

It *seems* everyone is getting on the bandwagon to do everything on the computer. I'm no exception! I don't write if I don't have to. Here are some of the advantages and capabilities of recording your genealogy on the computer:

First, the Good News!

- There are computer programs for every budget, from Brother's Keeper which is available on most bulletin boards, to Personal Ancestral File (from the LDS) for about \$35, to Roots IV for several hundred dollars. Some programs will do everything but the research for you, so you just need to decide what you want. Key things to watch for include the abilities to:
 - o expand to accommodate your family (we thought a few hundred would be more than enough we're up to over 10,000 individuals in our database, and it continues growing nearly every day!); and
 - o import and export GEDCOM files, which will make your life much more pleasant when you wish to upgrade to another program, share information with a friend or relative, or submit information to the LDS for their database.
- Most computer programs will print various reports and charts, some of which are absolutely gorgeous and others of which are simply functional. This capability will save you time in preparing to exchange with others who do not have computer capabilities - however, be sure to check the print quality and remember that the output from some printers will fade over time. You want to be sure others will be able to read it next year (sometimes fading print is worse than none at all).
- Remember that when you are taking information from documents to put into your computer program, you need to organize it and reference the sources for EVERYTHING! On paper documents, the reader can often see the source indicated (or know that it's a photocopy of a birth certificate). In your computer program, you must spell that out so later you will know quickly from where the information came.

Now, a few cautions I'd like to point out about genealogy on the computer.

- Think about your descendants. You get very excited when you find something your ancestors wrote throw a little crumb to your descendants by leaving them written genealogical records of some sort.
- Will anyone be able to read your computer files in 50 years if they find the disks (or even the computer) in the attic? If your files don't go directly to someone who protects them and maintains them, will they be of any use later on (or will anyone even know they're there)?
- When you print your data, what kind of printer, ink and paper are you using? A dot matrix printer ink fades in just a few months -it will be totally worthless in a few years. Laser printers are better, but are you using acid-free paper?

All in All

By using this "four-pronged" approach to organizing your records, you will have the data you need, where y u need it, when you need it. Establish a sequence of handling new data -for example, update your Portable file, then Computer File, then Surname File, then file appropriate records in the Proof File. Stay with this system and all your records will stay in sync, making them more valuable to you, and allowing you to use your limited genealogy research time more efficiently!