



# Organizing Your Genealogy

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You've probably discovered that doing genealogy produces stuff. Stuff can include names, dates, places, families, documents, newspapers, pictures, charts, and much more. Understanding what you have found, determining whether that information is valid, planning the next step in your research, and finding that information again later on all requires that you spend time organizing that stuff. This class is designed to give you tips and ideas on how to sort and use those names and dates and how to organize those documents.

## **ORGANIZING INFORMATION**

Genealogists collect way more information than documents. Ask a genealogist who they're currently researching and they'll be able to spout off names, dates, relationships, residences, stories, and much more. Just like the documents this information comes from; these tidbits also need to be organized. Use the tools below to help you get a handle on all of those scraps of information whizzing about in your head.

### **Organize your Family Tree Data Using Online Family Trees**

In the past, most people painstakingly recorded names and dates on paper pedigree charts and family group sheets. But pedigree charts on paper can be hard to sort and keep track of, especially with the exponentially increasing number of both direct and collateral lines most genealogists are searching. Online Family Trees and Record Management Software will help you to compile information about each ancestor and family. You will also be provided with tools to organize multiplying ancestral families as well as collateral lines.

#### **Online Family Trees**

- Family Tree at [www.familysearch.org](http://www.familysearch.org)
- Ancestry Trees [www.ancestry.com](http://www.ancestry.com)
- findmypast FamilyTree [www.findmypast.com](http://www.findmypast.com)
- Geni Family Tree [www.geni.com](http://www.geni.com)
- MyHeritage Family Tree [www.myheritage.com](http://www.myheritage.com)
- See Cyndislist.com for more Online Trees:
  - <http://www.cyndislist.com/genealogy-website/online-family-trees/>

#### **Record Management Software**

There are many different programs that fall under the category of Record Management Software. Wikipedia has a great comparison of many of the different record management tools. Search for "Comparison of Genealogy Software" at <http://en.wikipedia.org>. You can also check out a list of

FamilySearch affiliate programs at [FamilySearch.org/apps/](http://FamilySearch.org/apps/). Some of the most popular products are the following:

- Ancestral Quest Windows and Mac (free basic program; syncs with FamilySearch FamilyTree)
- Family Tree Maker
- Legacy Family Tree (free trial; syncs with FamilySearch FamilyTree)
- Mac FamilyTree (free trial; syncs with FamilySearch FamilyTree)
- Research Ties (yearly subscription; works with FamilySearch FamilyTree)
- Roots Magic for Windows and Mac (syncs with FamilySearch FamilyTree)
- The Master Genealogist
- Find mobile apps at [familysearch.org/apps/](http://familysearch.org/apps/)

## Research Logs

A Research Log (sometimes known as a Research Calendar) is tool that allows genealogists to track the resources they have searched in researching a family or answering a research question. Research logs are helpful in preventing duplicate searches, planning a research trip or research session at a local repository, and can be used as an index to research files. When using a research log, make sure to record both positive and negative results. Though traditionally kept in a table format, a narratives structure might work just as well.

Many different genealogy groups have published and made available sample research logs or you can create your own. A traditional table should at least include columns for the date, sources searched (including source details), search results, and document number (document numbers will be discussed in more detail below). Consider also adding columns for repository/call number,

Research Log				
Ancestor's name				
Objective(s)				Locality
Date of search	Location/ call number	Description of source (author, title, year, pages)	Comments (purpose of search, results, years and names searched)	Doc. number

purpose of the search, condition of the record, original or derivative, etc. At the top of the report, make sure to include information about the ancestor/family that the research focuses on, the research question, the researcher, and the page (if the research log is multiple pages).

A downloadable template for a Word Document research log and a pdf printable research log can be found on the FamilySearch Wiki. Go to Wiki and type "research logs" in the search box.

## Transcripts, Abstracts, and Extracts

Many genealogists are great at collecting documents but are not that experienced in figuring out what the documents say. One way to make sure you have really read through, understand, and analyze the documents you have found is to either transcribe or abstract any source that contains lengthy blocks of handwritten (or even typewritten) text including land records, marriage contracts, wills, probate records, letters, etc.

A transcript is an exact word-for-word copy of the original document preserving original spelling, grammar, punctuation, and line breaks. An abstract is the summary of a document, highlighting what the abstractor thinks are the important pieces of information. Creating either a transcript or an abstract requires a careful reading of an original document. This will allow you to carefully consider the information you have found and may highlight clues that may otherwise be overlooked.

Transcripts, Abstracts, and Extracts can both be created using a pad of paper or any word processing program. When you transcribe or abstract a document, make sure to include the entire source and citation. File the completed transcript or abstract with your other documents.

For more information on transcripts and abstracts, see Bell, Mary Mc Campbell, "Transcripts and Abstracts" in *Professional Genealogy: A Manual for Researchers, Writers, Editors, Lecturers, and Librarians* edited by Elizabeth Shown Mills, chapter 16 (FHL 929.1 P942m).

## Timelines

For many of us, a timeline is a single horizontal line with miniscule events written diagonally along the line. But in genealogy, timelines are simply a list of events sorted chronologically. Timelines allow you to look at everything you know about an individual or family and quickly determine what records you might want to search next, assumptions that haven't been proven, and highlights gaps in someone's life with little or no documentation. A good timeline provides enough of an overview so that any of your friends, or another genealogist, can quickly determine what you've searched and what still needs to be done to resolve your research question.

Timelines can be recorded either as a list or in a table. Make sure that you record each event in your research subject's life including vital events of both the research subject and his or her children, residences (as evidence by a census), land purchases, etc. Additional rows may be used

<b>T I M E L I N E</b>			
Ancestor's Name: _____		Research Objective: _____	
<b>DATE</b>	<b>EVENT</b>	<b>LOCATION</b>	<b>SOURCE(s)</b>

to highlight time spans with little documentation or assumptions. Consider including columns for date of event, event details, location, and source(s).

## Tables

What if you're working in an archive that doesn't allow you to photocopy or take pictures of their documents and you want to extract large amounts of information? What if you want to sort all of the pieces of paper in a probate packet by date? What if you want to compare different documents to establish probably birthdates for an entire family? Try building a table.

Tables can be used for many different purposes in genealogy. In addition to allowing for the quick extraction of data, they compile and correlate information in a logical and visual manner. (We have already talked about two possible tables: research logs and timelines) Tables can compile information about one family for one record type (for example, tracking an entire family through all census records in which they should appear), They can be used to compare relationships between an individual and the other names found in his or her records (also known as a fan club

or family, associates and neighbors). Tables can be used to differentiate between families of the same surname in the same locality. When you have a lot of data and need to sort it out, build yourself a table.

## **ORGANIZING DOCUMENTS**

Organizing information oftentimes just produces more files, more documents that need to be organized. Setting up a usable, understandable, and flexible organizing system is an essential part of doing genealogy so that you not only know what you have found, you can find it again, or you can locate your own copy within your organization system. Remember, however that no one organization system will work for everyone. Make sure to build something that works for you.

### **Research Logs and Document Labeling**

Research Logs should play an important role in any organization system. Most researchers record a document number for each source they find. Document numbers are simply assigned based on the order in which the documents are located. The document number is then recorded on the document itself, linking the research log to the documents. Documents can then be stored with the research log they relate to; the documents sorted in document number order. In addition to the document number, the complete source and citation should also be noted on the front of each document. (This information can be recorded by hand, printed on a label, or added digitally using a photo editor.)

### **General Tips on Building a Filing System**

- Build files around families instead of individuals:
  - A family is created when a couple marries
  - When a child marries, a new family is created and a new file is made
  - If a child never marries information about them stays with the parents
  - If a spouse remarries a new family begins with a new file
- Build a system that can easily be adapted to both your paper files and your computer files. Think of all of your documents, no matter whether they are stored digitally or on paper, as a single filing system.
- A system should be made to grow over time. Do not try to create folders for everyone at the beginning but create them as needed. (Make use of the alphabet or numbers as these are automatically sorted in Windows Explorer.)

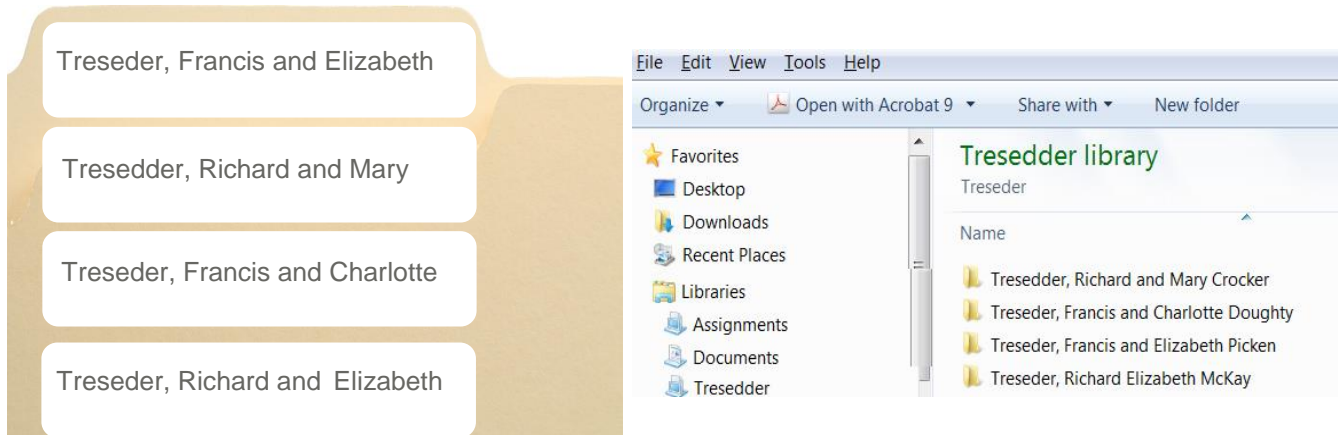
### **Tips for working with Computer Files:**

- Work with all of your computer files through Windows or a similar program so that you are working with all of your files at the same time.
- Naming files is an essential part of the organization process
  - Make sure to record enough information in the name so that you know what the file is without having to open it.
  - List all of the information in the same order. For example, don't start some of your files with a date and then others in the same folder with a locality.
  - Files names starting with dates should list the year first then the month (numerically), and then the day to preserve the chronological order of the files.

Use hyperlinks to connect record management software and research logs with original documents. Any good filing system has to be built around three separate divisions: families/surnames, localities, and record types. When you build your filing system, make sure to

keep all three divisions in mind. You may choose to primarily sort by families but information about localities and records types should be recorded on research logs, timelines, and in file names. The same goes for working primarily with localities or with record types. Make sure include elements of all three divisions.

### Example System: Organize by Family



Organize first by family, then by locality (if necessary), then document number. On the computer, file names should include the document number, the record type/details, locality, the people involved, and the date of record.

### Other Filing Systems Suggestions

- Organize first by locality, then by record type, and then by family line (if necessary). (This works best if the system is primarily computer based.) Hyperlink documents to a research log. File names should include family involved, record details, and date of record (if necessary)
- Organize first by record type, then by family. On the computer, file names should include family involved, date of record, locality, and record details.
- Organize by family and date the record was viewed. Files should be numbered chronological as they are researched. On the computer, file names should include document number, family involved, locality, and record details.

### CONCLUSION

As you start the organizing process, make sure to set up a good stable system to track your documents. But don't stop there. Make sure the information you found in those documents has been analyzed and is also organized in a way that what you know can lead you to what you don't know.