

Organizing Your Research

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Introduction

For many genealogists, “organization” can be a dirty word. The very thought of having to organize all that research—all those paper and computer files—makes them shudder. No matter how monumental the task may seem, a systematic method saves valuable time and creates more accurate work.

This Portable Genealogist will offer practical advice on how to organize your research and files, keep track of families, and create goals to guide future research. Even if you are a seasoned family historian, it’s not too late to incorporate these practices into your work. The result will be a time-saving system that makes sharing information easier.

TOPICS

- Organization basics
- Keeping track of families
- Research logs
- Preparing for future research
- Filing

NEHGS TIPS

Genealogical software can do a lot to help you conduct, organize, and share your research. If you’re in the market for a new program, view a list of suggested software and consult a feature comparison chart at our online Learning Center at AmericanAncestors.org.

Organization Basics

Even though specialized computer programs and online family trees help organize your findings and keep your research on track, you still need to understand the basics of research methodology and organization to ensure your research is as thorough, accurate, and efficient as possible. There is no one way to organize your research, but there are some governing principles:

- ✓ Use an organization system you can maintain
- ✓ Consistency is key
- ✓ Leave a paper trail

Choosing an organization system

Your organization should be both effective and efficient. An overly complicated procedure with color coding, unique document number assignment, alphabetizing, and topical cataloging may get in the way of your actual research. You want a system that’s easy to implement and maintain and one that someone else can easily decipher.

Maintaining consistency

Be consistent about your organization system and in your method of reporting and note taking.

Some suggestions:

- Always list a woman by her maiden name.
- List place names in order from smallest to largest jurisdiction (town/parish, county/shire, state/province, country).
- Use the date system DD-MMM-YYYY (day, first three letters of the month, and complete year).
- For consistent documentation, keep a running list of sources with your abbreviations.

Leaving a paper trail

Computer filing is great, but who knows whether future family recordkeepers will be able to access your research? Build a contingency plan into your routine organization with paper filing. Your descendants will thank you!

Tracking Families

There are two common forms used in organizing and tracking families: family group sheets and multi-generational charts. While most genealogy software programs allow you to export your findings in these forms, it is important to understand how each works and how they can be organized to best support future research.



A family group sheet and five-generation chart template is available at AmericanAncestors.org.

Family Group Sheet

A family group sheet provides a snapshot of each nuclear family and records pertinent information about each family member. This information may include:

- *For father and mother:* given and last name(s); birth, death, and marriage date and place; parents' names; other marriages
- *For children:* sex, given and last name(s); birth, death, and marriage date and place; spouse's name

How to organize: File or arrange sheets alphabetically by the surname of the head of household.

Multi-Generational Chart

Sometimes called a "Pedigree Chart," this family tracking tool provides a road map of your ancestors and includes basic information about each couple: full name and date and place of birth, death, and marriage. Each person on the chart receives a number. The subject of the chart is number 1; the subject's father is 2, the mother is 3; the father's father is 4, the father's mother is 5; etc. Each chart is assigned a number and cross-referenced to connect charts and generations. Thus, every ancestor receives a unique number that can be used as shorthand or for filing. E.g., 3:6 refers to chart number 3, person number 6.

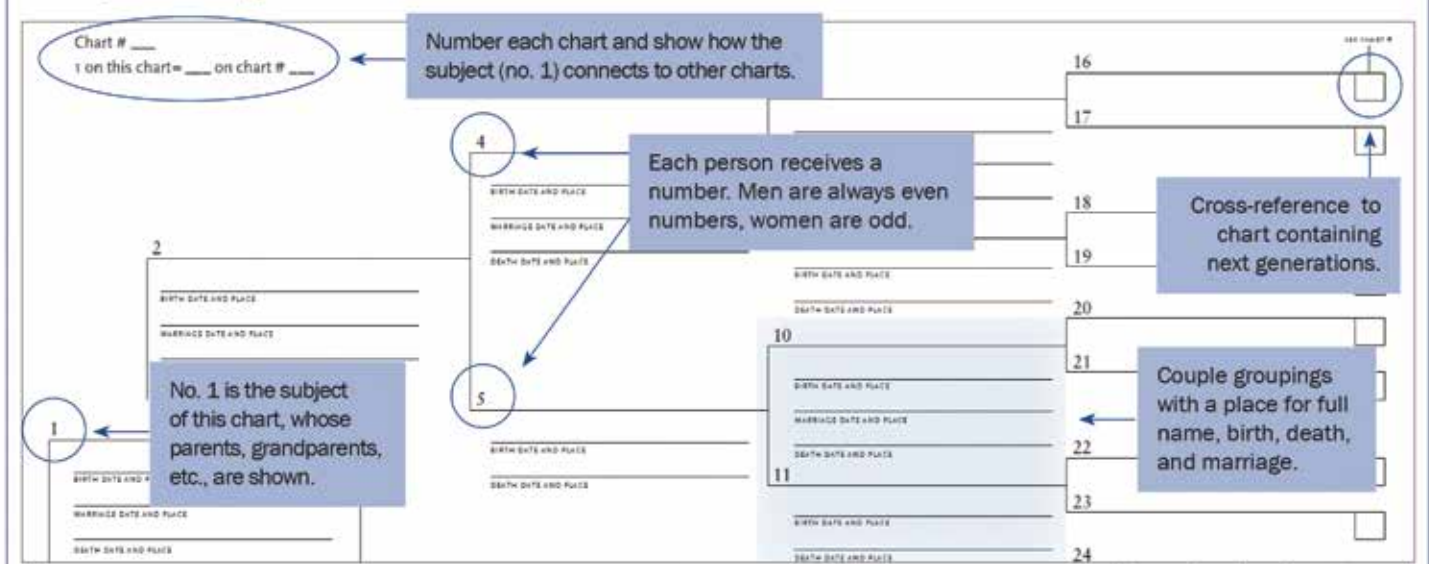
How to organize: Arrange by chart number.

Example: Family group sheet

Father	Given Name(s)		Last Name
	Born	Place	
	Died	Place	
	Married	Place	
	Father's Father (first, middle, last)		
	Father's Mother (first, middle, maiden)		
Other Marriages (first, middle, last)			
Mother	Given Name(s)		Last Name
	Born	Place	
	Died	Place	
	Mother's Father (first, middle, last)		
	Mother's Mother (first, middle, maiden)		
	Other Marriages (first, middle, last)		
Child #1	Given Name(s)		Last Name
	Born	Place	
	Died	Place	
	Spouse (first, middle, last)		
	Married	Place	

Source: AmericanAncestors.org.

Example: Multi-generational chart



Source: AmericanAncestors.org.

Research Logs

Research logs are an excellent way to keep track of the research you have already accomplished. They contain a list of *every* source you consulted—and whether your search was successful or not. Handwritten or typed, these logs help prevent duplicate searches and lookups.



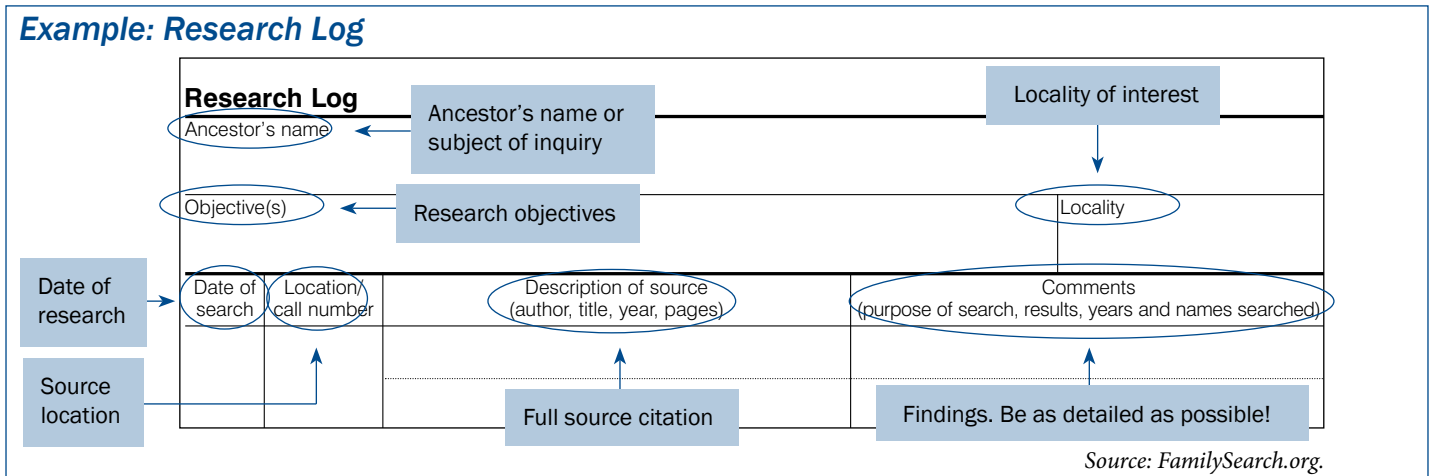
Design your own research log using Microsoft Word or download a template available at FamilySearch.org and AmericanAncestors.org.

Create a log(s) for each ancestor, town, and/or topic you are investigating. Consider including the following:

- *Subject of inquiry:* A specific ancestor, ancestral town, or historical topic.
- *Objective(s):* As general as “find data on this person” or as detailed as “find where he was living in 1865.”
- *Date of research:* The full date you researched this item of source.
- *Repository:* Where you found the data. The repository may be the only place the record exists.
- *Call number:* If applicable, the library call number. This will save you time if you need to revisit the source.
- *Source:* All the information needed to properly cite your source (author/editor, full title, place of publisher, publisher name, copyright, pages, URL, etc.). For microfilmed records, include the year range, volume, and any other identifying information.
- *Comments or results:* All positive and negative evidence (i.e. what you did and, just as important, did *not* find).
- *Document number:* If applicable to your filing system (i.e., if each piece of paper receives a unique number).

How to organize: File or arrange chronologically by your date of research or alphabetically by ancestor.

Example: Research Log



Planning Future Research

All gaps in your research can be phrased as a question: When was my ancestor born? Where is she buried? Did she have a will? The one constant in genealogical research is that when one question is answered, four more emerge. The trick is to record the questions at the time they come up. You can do this in a number of ways.

- *Spreadsheet:* Using Microsoft Excel or another spreadsheet program, keep a running master list of questions. In addition to the question or task, include columns for the date the questions arose, the relevant surname, ancestor, possible repository where you might find the answer, the result, and when it was answered. A spreadsheet allows you to sort your list by data column, making it easy to arrange your list by answered and unanswered questions, surname, repository, etc. This tool can help you plan research trips and know where gaps are.
- *Genealogical software:* Most family tree software allows you to add free-form text to each entry, sometimes called “task list” or “to-do items.” Add questions that arise about a certain person.
- *Notebook:* Even if you don’t have your computer handy, make sure your notebook is!



Consolidate your research questions. You may be anywhere, doing anything, when a question pops into your head. Record it as you can and add it to a master list.

Filing

Even with a genealogical software program, you most likely still have loose-leaf papers, copies of records, research requests, correspondence, original documents or pictures, and handwritten notes. Whether maintaining computer files, paper files, or both, you'll need to develop an organization system that finds a proper home for all these materials.



The suggested filing systems below are just two options. Many others can be found within the Recommended Resources on this page.

Paper Filing

Adapted from a BYU family history course, the family folder system creates a file folder for each couple on your multi-generation chart. The same filing structure can be applied electronically with scans of each document.

Step 1	Create a folder for each couple on your multi-generational chart. File alphabetically by the name of the husband or arrange the folders by the husband's unique identifying number. (E.g., if the husband is chart 3, number 6 [3:6], then he would be filed after the man who is chart 3, number 4 [3:4].)
Step 2	Number each document within the folder. Create a list of each document number within the folder along with its date and a brief summary of its content. Affix this "inventory" to the front of the folder.
Step 3	Create a research-planning sheet and place at the front of the folder. This sheet should include all information about the individual and where the research gaps lie. Continue to update this form using your research logs.

Computer Filing

When arranging your electronic files, consider the following:



Step 1	Create a folder tree on your computer with this hierarchy: Family Tree > Surname > Ancestor. <i>For example:</i> 📁 Johnson Family Tree 📁 Patraw Surname 📄 Lemuel Patraw
Step 2	Name all files within the folder using a consistent method that provides detail on the document's content and source.

When naming files, include information about the document's content and source. Example:

Lemuel_patraw_ww1_st_paul_db4.jpg

Lemuel's World War I draft card, registered with St. Paul (Minnesota) Draft Board no. 4.

Recommended Resources

- William Dollarhide, *Managing a Genealogical Project* (Baltimore: Genealogical Publishing Co., 1988, rpt. 1999)
- Lauren R. Jaussi, *Genealogy Fundamentals* (Orem, Utah: Jaussi Publications, 1995)
- Sharon DeBartolo, Carmack *Organizing Your Family History Search* (Cincinnati: Betterway Books, 1999)
- Katherine Scott Sturdevant, *Organizing & Preserving Your Heirloom Documents* (Cincinnati: Betterway Books, 2002)
- Other Portable Genealogists, especially those on writing: *Building a Genealogical Sketch* and *Genealogical Numbering*, both by Penny Stratton
- NEHGS Online Education Center at AmericanAncestors.org

