



ORGANIZING YOUR GENEALOGY RECORDS

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What are your goals?

Why are you saving your work?

- For your own use
- For your family or others
- For everybody

What we will cover

- Review of the types of records and sources you may have collected over the years that you have kept
- What you should keep?
- What can you safely discard?
- How should you organize what you keep?
- Tools to help with the organization process

What have you accumulated?

- Your notes
- Copies of material you have found at libraries
- Family letters
- Family photographs
- Compiled family histories
- Artifacts (diaries, quilts, Bibles)

What should you keep (preserve)?

- Whatever feels important to you
- Photos and original documents of direct line in your family
 - *Scanning capabilities keep getting better*
 - *Someone might be able to get more out of your image in the future*
- Artifacts
- Current working documents to share with family

How should you organize what you keep?

- Boxes for each side of your family tree (maternal and paternal)
 - Folders by surname
- General folders such as:
 - Locality
 - History
 - General Genealogy

Keep in mind

- Whether or not you keep an original, always record enough information either to be able to identify where you got it or where to find it again

Examples (for individual or family group)

Letters/email

Memoirs/reminiscences

Diaries/blogs

Scrapbooks/photo albums

Professional papers

Genealogical information

Speeches/lectures

Articles/essays

Subject files

Legal documents

Minutes/reports

Brochures and fliers

Awards/certificates

Photographs (with subjects and locations identified)

Films/videos/audio tapes (including identifying information)

Websites

Also of interest are files relating to an individual's civic, business, religious, political, and social activities.

Tools for Organizing

- Archival boxes and folders
- Research logs or to do lists
 - *Paper forms designed for genealogy*
 - *Spreadsheet*
 - *Software: Clooz, Evernote*
 - *Built into your genealogy software*
- Review for deletion

Create research logs to record:

- **Date of research** (be sure to include all 4 digits of the year)
- **Repository** (archive, library, cemetery, or vital record office)
- **Finding number** (ISBN, library call number, manuscript number, microfilm number)
- Full source citation and description
- Comments (What did you look for? Did you find it? Was the record hard to read?)
- Miscellaneous fields (surnames, location, time period, condition of source)

Organize

- Paper/Boxes
- Digital files
- Digital images
- Digital bookmarks and email
- Digital media (and/or locations)

Digital locations (LOCKSS)

- External hard drives
- Recordable DVD
- Cloud (online storage)
 - [Dropbox](#)
 - [Google Drive](#)
- Digital Repositories
 - [Ancestry](#)
 - [Family Search](#)
 - [Wikitree](#)
 - [NEHGS](#) (American Ancestors)

External Places

- SAA Brochure on Where to donate your personal or family records

<https://www2.archivists.org/publications/brochures/donating-familyrecs>

Donating Your Personal or Family Records to a Repository (S.A.A.)

- Personal Histories Preserved for Community Memory
- What Is a Repository and What Can It Do for You?
- What to Preserve
- What Is Historically Valuable Material?
- Do You Need to “Cull” the Materials or Reorganize Them?
- Will a Repository Take Everything You Offer
- Your Personal Records Could Have Historic Value

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Benefits of Donating to a Repository

- Environmental control
- Secure physical and digital storage
- Proper handling and use.
- Make your resources accessible to you and others in the future. Researchers—including students, professors, genealogists, journalists, and many others—may thus find your records both interesting and of value to their work.

What can you safely discard?

- Any reproducible records (i.e. census records) that you have digitized (scanned, photographed) and saved in at least two places
- Notes that you have transcribed and sourced in your genealogy software
- Earlier versions of your genealogy software that you have updated

Resources

- Rhonda R. McClure, *Portable Genealogist: Organizing Your Research*. (Boston: NEHGS, 2013)
- Sharon DeBartolo Carmack, *Organizing Your Family History Search: Efficient & Effective Ways to Gather and Protect Your Genealogical Research*. (Cincinnati, Ohio: Betterway Books, 1999)
- William Dollarhide, *Managing a Genealogical Project*. (Baltimore, Md.: Genealogical Publishing Company, Inc., 1999)
- Drew Smith, *Organize Your Genealogy: Strategies and Solutions for Every Researcher* (Cincinnati, Ohio: Family Tree Books, 2016)
- Hope Tillman & Walt Howe. *Storing Your Tree in the Cloud*.
<http://www.hopetillman.com/hopewp/wp-content/uploads/2017/05/storing20150516-links.pdf>