Organization is the Key!

To be successful in your genealogy research, you must be able to plan each research step, and organize the information you find there. What use is it to have great organizational skills if you don't have a clue where to look for the information? It's just as futile if you do well planning the research, but have lousy organizational skills! There is a happy medium -- if you organize the results of your research, you tend to be more organized in your search for information, and more focused on specific research goals. Organized results allow you to evaluate and analyze information quicker and more thoroughly, freeing your time for more research.

It doesn't take a new genealogist very long to discover that the ancestral paper trail quickly becomes uncontrollable. Miscellaneous scraps of paper with undecipherable notes, orphaned photocopies with no identifying marks, lecture and class handouts, copies of e-mails, bibliographic references, post-it notes, scribbled messages, and torn bits of magazine or newspaper articles make every genealogist's filing cabinets a chaotic nightmare.

How Well-Organized Are You Now?
Sure, every researcher has lots of information...but locating and using that information is often a challenge. Think you're pretty organized? Take a look at the questions below:

- ❏ Do you know exactly what information you have for each ancestor?
- ❏ Do you have a complete list of information you are missing for each ancestor?
- ❏ Do you know exactly what resources you've checked, and what results you found?
- ❏ Do you know every book you've ever searched?
- ❏ Do you remember whom you've contacted and what response you received?
- ❏ Can you put your hands on any piece of information in your files in 10 seconds or less?

If you answered yes to the questions above, stop reading this lesson -- it will do you no good. If you are with the majority of genealogists who feel their information is in disarray, this lesson will guide you in the first steps of organization.

Now that's a big claim! Becoming organized is not an easy, one-step process. I'm of the belief that there are three facets of organization, each one of which can take a while to put in place. But once you have all three parts working, you should be able to quickly and easily find any bit of genealogical data you have gathered, know what information you have and what you still need, and have a comprehensive knowledge of what resources you've already checked.

The first facet of organization is the use of charts and forms to display and clarify information. The second facet is the use of software to organize information

electronically, in a form which can be easily and quickly cross-referenced, indexed, and used to generate endless variations of reports. The third stage of organization is to create a usable, coherent filing system which allows you to physically organize.

Organization: Phase One

This lesson will discuss the first aspect of organization -- using forms and charts to manage that unruly collection of information. Each type of chart or form listed below will be described, and examples provided as to their use. Whether or not you use them is up to you, as each person has their preferences about what works for them. I would suggest you try each form once, just to get a feel for its organizing capability.

Let's take it one step at a time (see how organized we are already!):

1. Gather up your miscellaneous notes, photocopy orphans, scraps of paper with notes on them, citations, post-it notes, etc.
2. Place them in a large box, bag, ceremonial fertility mask, or whatever container you have.
3. Sort the through the items, and place them into stacks according to their reference--individual or surname.
4. Information which is not specific to one individual can be placed in a general reference stack (i.e., bibliography, correspondence info).
5. Magazine and newspaper articles, lecture notes, and so on can be sorted by surname, location, or topic.
6. Don't worry about having too many stacks -- there is no problem which is not made easier by breaking it down to smaller pieces.
7. Once you have all of the miscellaneous bits arranged in stacks, begin entering the information, one stack at a time, on the appropriate forms. Note: some forms and charts are created for just one individual, others are for multiple people, so make sure you are recording information on the proper form!
8. Some forms may be generated by computer, such as family group sheets, pedigree charts, ahnentafels, and alphabetical ancestor lists. Be sure to print out all sources, notes, and citations!
9. Record ALL the information you have, including the source of the information, date, location, etc. In some instances, you may want to save the piece of paper itself...photocopies of articles, signatures, etc. can be pasted or taped to a standard size sheet of paper, or placed in a archival paper holder.
10. Once you've finished entering the information you have on the reference forms and charts, you will be able to generate information gathering and research planning forms.

Some forms may require you to do more work than others; for example, a migration trail map is much more difficult to create than it is to print out a family group sheet from your genealogy database. However, it is important that you take the time to enter the information in as many *useful* formats as you can. The key word here is *useful* -- if you find yourself wasting time by duplicating the information on forms which serve no purpose, you've gone over the Genealogy Chart & Form deep end, and you should re-evaluate which forms you *really* need.

After filling out the forms, take a step back and look at them with a critical eye.

- Is the information displayed in a more logical manner?
- Does it clarify what areas you need to concentrate your research on?
- Does it show the holes in your research?
- Does it make clear where you've been in your research?
- Are ideas for further avenues of research indicated?

Hopefully all of the above will apply.

Before you throw out your miscellaneous bits of papers, notes, etc. give them a quick once-over. Do you have all of the information contained on the paper copied elsewhere? Is the paper something unique (a photocopy) that you might want to save? Only after you are satisfied that you have the important information can you toss the clutter.

Below is a list of different types of charts and forms which may be useful to your research. Some forms have sample images or links to online forms freely available for your use, and others can be created by using a genealogy database program.

Forms and Charts for Organizing Information

Ahnentafel:
> An Ahnentafel (German for Ancestor Table) is a written out version of a pedigree chart. Each generation is presented and separated from the next by a line, space, or some other divider. Ahnentafels are useful for presenting direct line ancestries.

Alphabetical surname list:
> A list of individuals you are actively searching, alphabetized, with basic birth and death information can be a helpful checklist when searching through indexes, queries, and databases. Surname lists are also helpful when you want to exchange information with other researchers in a library.

Biographical outline (chronology):
> If you have more than one or two pieces of information on an individual, it can be useful to create a list of major events of that person's life. Such outlines can display exactly what information you have and what information is missing.

Cemetery log:

A great worksheet to take with you when researching cemetery records, or visiting a cemetery in person. Cemetery logs can also show families, collateral lines, and friends since many people were buried in clusters. Figure 1 shows a sample cemetery log (38K download).

Cemetery Log

Name of Cemetery: _Mukilteo Pioneer Cemetery_

Town/County: _Mukilteo, Sno._ Physical Address: _22391 Evergreen Way_

Name	Age	Date of Birth	Date of Death	Inscription	Location in Cemetery
Stites, John	39	1808	1 Jul 1848	RIP	Lot 54
Stites, Mary	50	1815	30/1/1865	Beloved wife of	Lot 54

Correspondence log:

Just as a research log shows you what resources you've searched, a correspondence log details your communications with other researchers, archives, societies, and other resources. Your correspondence log can include names, dates and subjects, or you can be a little more detailed and note any expenses, results of the correspondence, and surnames of interest. As with the research log (described on the next page), the correspondence log can be adapted for Internet use by including entries for e-mails to interested researchers. Figure 2 shows a sample correspondence log (7K download).

Date	Address	Information Requested	Information Rec'd	$ Sent

Family group sheet:

One of the most frequently used charts, the FGS presents information about a family in an easily read format. Sources can be entered on the back side if room is limited on the front. Blank FGS can be used as worksheets when researching.

Index to Notes and Handouts:

If you attend many society meetings, classes, or lectures you probably receive lots of handouts. Since most handouts don't apply to any specific family, remembering what handouts and notes you have can be difficult. An index, organized alphabetically (if possible) will give you an "at a glance" reference to what sources of information you have.

Marriage log:

Another handy index to take with you when researching, or searching online sources, a marriage log displays information about the bride and groom for a specific location. You can adapt the form to your needs if you wish to cover more than one location on a form. Figure 3 shows a sample marriage log (32K download).
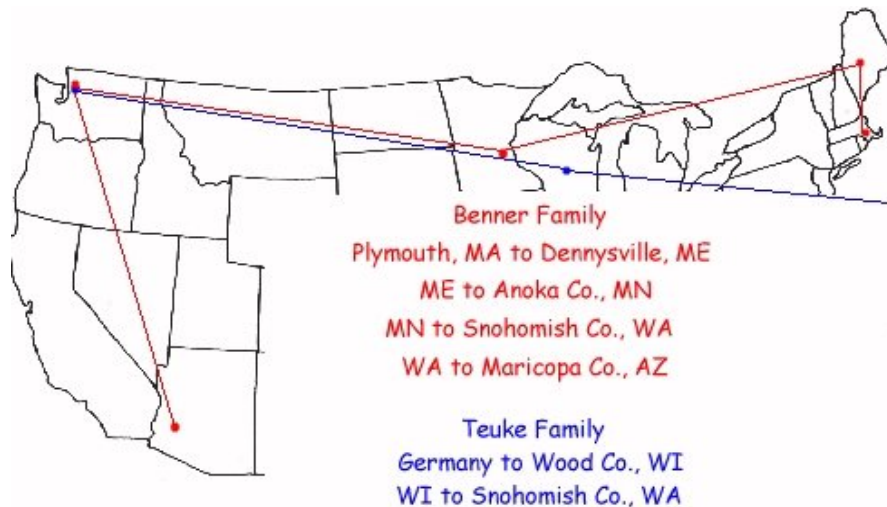
Marriage Log

Town/County/State: _Plymouth, Plymouth, MA_
Weymouth, MA

Courthouse Address: _____

Name of Groom	Age	Name of Bride	Age	Book	Page	Date of Wedding
James Cushman		Sarah Hatch		14	40	24 Dec 1722
Asa Pratt	23	Sally Lovell	18	2	146	8 Nov 1789

Migration trail map:

Very few of us have ancestors who stayed in one spot for many generations. Migration trail maps display everywhere your ancestors lived, which is useful when trying to locate specific locality resources. A migration trail can also lead you to further information about the forces which drove the families to move (war, land opportunities, crop failures, or just itchy feet). You should be sure to check out each stop for collateral lines and extended families. Figure 4 shows a sample migration trail map (32K download).

Benner Family
Plymouth, MA to Dennysville, ME
ME to Anoka Co., MN
MN to Snohomish Co., WA
WA to Maricopa Co., AZ

Teuke Family
Germany to Wood Co., WI
WI to Snohomish Co., WA

Pedigree chart:

> Another one of the most frequently used charts, a pedigree chart (aka lineage or ancestral chart) displays generally three or four generations of ancestors for a specific individual. Although supplemental information (birth, death, and marriage info) can be added, the pedigree chart is not the place to record sources. Blank pedigree charts are useful as worksheets when researching.

Relationship chart:

> If you are confused about how one individual is related to another person, or group of people, a relationship chart will tell you their relationship. There are several relationship (cousinship) charts available online, but for multiple relationships, use a genealogy database program to generate a chart. Relationship charts can be very helpful when you have two ancestral lines which inter-marry.

Research log:

> Research logs can be divided by individual or surname, as you desire. Logs should be taken with you when you research, and every item you search should be entered. This may seem like a lot of work (especially for those resources in which you find no information) but a detailed research log can be used as a roadmap to show you what resources you've checked, and what results you found there. You may adapt a research log for use on Internet as well; notations of what web sites, indexes, and databases you've searched can be helpful, as well as listing those sites and newsgroups to which you have submitted a query. Figure 5 shows a sample research log (67K download).

Genealogy Research Log

Ancestor's Name				Chart Number	
Hartley Boynton Benner				*B-15*	

Information Needed				Location	
Birth Date Verification				*Old Town, Maine*	

Date of Search	Location/ Call No.	Source	Comments	Document Number
15/3 1995	SPL	*Benners of Maine by Mark A. Benner*	*Related line, some info on Hartley.*	
2/4 1995	MLT FHC	*Old Town, ME Vital Records*	*Nothing listed for Hartley.*	
12/4 1995	Film #223	*1860 ME Census*	*Hartley's parents Hiram & Jenny are listed.*	BEN-2

Forms and Charts for Gathering New Information

Abstract forms for deeds and wills:

Any researcher familiar with courthouses knows how easy it is to neglect information when searching old county records. An abstract form walks you through the task of extracting vital information from deeds and wills by prompting you to note the important information found on these legal documents. An abstract form is worth its weight in gold when you find yourself in a dusty, dimly-lit courthouse basement with a huge deed book on your lap.

Census extract forms:

As easy as it is to miss information while rooting around in the local courthouse's old deed books, it's just as easy to miss information after you've worn out your eyes staring at census microfilm...hence the creation of census extract forms. These forms (available for all census years from 1790-1920) allow you to make notes of the important information and show families and neighbors as they occur on the microfilm. Any notes or comments you may wish to make can be entered on the back of the form. Census extract forms for 1790-1920 are available at Family Tree Maker Online's Genealogy "How-To" Guide.

Genealogy.com web site
http://www.genealogy.com/00000061.html?Welcome=1046132566

Ancestry.com web site Great site and has more than census forms
http://www.ancestry.com/save/charts/census.htm?rc=locale%7E&us=0

FamilySearch.org web site
www.familysearch.org This site you will have to click on the Search Tab, then Research Helps, then Sorted by Document Type on the left column. Look for the census year that you are going to research and click on the PDF file format. This will open up[the Adobe Reader and you can print the form from there.

Rory's Stories web site.
http://thunder.prohosting.com/~roryc/

Ancestor checklists:
There may come a time when you think you've looked at all available resources for an individual. If you need ideas of other possible sources, an ancestor checklist may provide the nudge you need. You can modify checklists by adding your own checklist items for the locality or ethnicity. You can see a sample ancestor checklist at Rory's Stories.
http://thunder.prohosting.com/~roryc/

Problem Worksheet:
If you are having trouble successfully finding information about an individual, you may need to organize your thoughts before searching willy-nilly. A problem worksheet can be created for an individual or a specific problem. If you need to find the birth and marriage records for a person, you can create a worksheet outlining the two problems, and possible avenues of research. A problem worksheet is your place to brainstorm--put down any ideas you have where you might look for answers. Note the results, and be sure to include the specifics in your research log.

Conclusion

There are other forms and charts you can use to organize and gather information; you can create a bibliography of your books and magazine articles, create a Notes form (see *The Unpuzzling Your Past Workbook* by Emily Anne Croom for an example) to help organize your note-taking skills, create a oral history list of questions, research flowchart, index of photos, and so on. Computers make it easy to create and generate and customize forms through the use of a word processor, database, or spreadsheet, so don't be afraid to create whatever form your own specific research demands!

Recommended Reading

Three very helpful organizing books are:

- *Beyond Pedigrees* by Beverly Delong Whitaker
- *The Unpuzzling Your Past Workbook* by Emily Anne Croom (lots of sample forms and examples)
- *Managing a Genealogical Project* by William Dollarhide

Maps

Maps can be a very helpful source in tracking where your ancestors lived and moved to. Use Cyndi's list to find a map for your areas. In the search area type in your state or country, then choose Maps, Gazetteers & Geographical Information. Then you can choose usually the very first option. There is usually a state map followed by a map of each county. Right click on the map of your choice and save it in your photos area of your computer. You then can call it up in Microsoft word as a whole page and print the map. Highlight each town your families were in. If you have more than one side of a family in one county use more than one color.

www.cyndislist.com

Worcester County Massachusetts
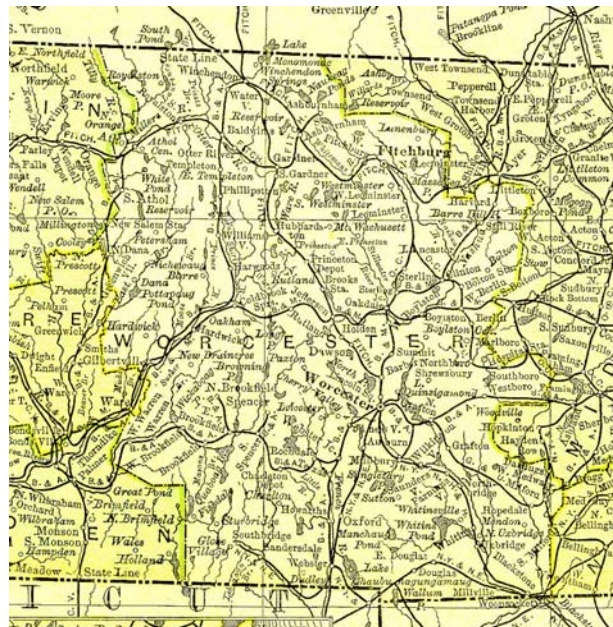
Another article on Organizing your Research is found at
www.genealogy.com/27_smith_print.html

FamilySearch.org
You can find 4 different files on organizing your files at Familysearch.org. They are:

Organizing Your Genealogy Using Computers [Description] [PDF]	
Organizing Your Paper Files [Description] [PDF]	
Organizing Your Paper Files Using Binders (Notebooks) [Description] [PDF]	
Organizing Your Paper Files Using File Folders [Description] [PDF]	

They can be accessed by the following hyperlink:

http://www.familysearch.org/Eng/Search/RG/frameset_rhelps.asp?Page=./research/Titleo/Titleo.asp&ActiveTab=Title