

# A SYSTEM FOR TRACKING GENEALOGICAL RESEARCH

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## **Introduction:**

New genealogists can learn the basic steps for doing genealogical research from readily available literature, from the staff at Family History Centers or Historical Societies, or from Ward Consultants. Learning how to keep track of the searches made and organizing the resulting piles of paper and documents is more personalized. While many methods have been presented, one must often learn which they like best by reading genealogical magazines and periodicals, attending sessions at genealogical seminars, and/or taking courses. The “Best System”, as pointed out by several authors has to correspond to the way a person thinks, thus one system may not work for everyone. However, a system for keeping track of genealogical research materials should consist of three main parts: 1) a standard form for recording the data; 2) a research log of what was done and what was found; and 3) a filing system.

## **Standard Form For Extracting And Recording Data:**

A pre-printed form was developed that included the information needed to make a proper source and repository citation in PAF 5.2, and lined space to record what was found. The form also includes a place to record “Bright Ideas” and “To Do” items for further research. The pre-printed form provides several advantages. First, the sheet size is standardized. Second, it is a reminder of all the documentation information that is needed. Third, the information is recorded in a standard format.

**Figure 1** Example of a Hand Written Entry Extraction Form.

Only record information about one surname on each pre-printed form. If you find information on another line start a new form, since they will generally be filed in two different files. When taking notes with a laptop, record the same information and use the same format.

**Figure 2** Example of a Computer Entry Extraction Form.

Main subject headings used in the Family History Library Catalog are used as “Record Type” categories.

## **Research Log of What You Do:**

Computer Research Log. A research log was developed using the Table feature of Microsoft Word. This log allows one to easily enter a name or title and a summary of the important information that is needed to track each individual research action or search that is conducted. The date the Research Log is printed is automatically recorded on each page. All of the seven columns of information can be sorted to place the particular item of interest in order. For example, the call number column can be sorted in numerical order, making it easy to see if a book or film has previously been searched.

**Figure 3.** Example of a Research Log

The research log becomes the table of contents for files. Each file will have its own table of contents (research log) that shows: 1) the file name, 2) the date of the search, 3) where it was conducted, 4) the call or film number, etc., 5) a brief title, 6) who or what was searched for, 7) the document number if something was found or nil if nothing was found, 8) the type of record searched, 9) the period of time, and 10) the location being searched.

## **Filing System:**

Computer organization is good for keeping track of information on your ancestors and the sources of the information; however, a filing system to manage all the paper is still needed. There are probably as many different ways to organize and file your genealogical documents as there are genealogists. The system you choose should be easy to use and maintain, and allow you to retrieve a needed document within minutes. Some common filing systems are:

Individual

Binders or files for each family line (Surname)

By Couple or Family Group

By Surname and Record Type

By Surname and Location – Alphabetical surname files – by locality. See **Figure 4.**

There are three vital pieces of information every genealogist must know to pursue genealogical evidence: 1) a name, 2) a date, and 3) a place. Of these three elements, the place is the one that tells you where to look for further information. For that reason the idea of separating source material by the place is a logical step.

Pedigree charts and family group sheets are compiled information based on your research notes and are therefore handled differently. Pedigree charts are filed by number of chart. Family group sheets are filed alphabetically. These two files are located in the front of the file cabinet.

Research Aids are also handled differently. These books, papers, maps, etc. are filed by locality.

Correspondence can be filed in the same “Surname – Locality” system.

**Remember that no system is right for everyone, and no rule says that methods cannot be combined or altered.**

**The Research Log Table described above should work with most filing methods. It could also be easily modified to fit in special cases.**

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