

Organizing Genealogical Research and Note Files

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I. Being organized is critical to good research.

- A. Need to know what records have already been searched.
- B. Need to know which searches were positive and which were nil.
- C. Need to be able to study the documents that have been found.
- D. Need to be able to determine what records are yet to be searched.
- E. Need to be able to locate any given document QUICKLY.

II. Tracking searches

- A. For every research session, record **all** searches on a research log.
 - 1. Record full bibliographic citations.
 - a. For proper documentation of the family group record.
 - b. In case the record needs to be searched again.
 - c. For possible future publication of the research.
 - 2. Record the date of research.
 - 3. Record the repository and the call number of the source.
 - 4. Record the scope of the search. (A specific individual, all entries of a given surname, a specific time period, etc.)
 - 5. Record whether the search is positive or a nil search.
- B. Accurately copy the information found in the source.
 - 1. Photocopies and digital images create an accurate record of the full information found in the source. This prevents copying errors and allows the researcher to review the record for more clues at a later time. (Be sure digital images are saved in non-proprietary, lossless file formats.)
 - 2. A transcription of the document provides a complete record of what was found, but it may create the need to return to the source if a copying error is suspected.
 - 3. For some records, an abstract of important information may be sufficient.

III. Tracking information

- A. Compile the information onto family group records, noting source citations.
- B. Family group records can easily be filed alphabetically.
- C. Reprint and keep pedigree charts current.
- D. Pedigree charts are generally filed numerically.

IV. Tracking documents

- A. Documents need to be categorized and filed.
- B. In paper files, a research log is located at the front of each file. The log becomes a table of contents to the folder of documents, so be sure to record your searches according to how they will be filed.
- C. One method of organizing the documents is by surname and then by locality.
 - 1. As a general rule, in-law surnames may only require a surname file.
 - 2. Files for direct-line surnames will likely become voluminous and confusing without organizing the records into smaller divisions.
- D. Folders - These can be manila or electronic.
 - 1. **General surname** - For documents that involve many localities or those created on the national level.
 - a. Family histories
 - b. new FamilySearch print-outs
 - c. Military records or other national collections
 - 2. **One for each state** - For documents that were created on a state level.
 - a. State histories
 - b. State census indexes
 - c. State genealogical collections
 - d. State birth, marriage, death certificates
 - 3. **One for each county within a state** - For documents created on a county level.
 - a. County histories
 - b. County land records
 - c. County vital records
 - d. Census records copied by county - This is an exception to filing the documents according to the jurisdiction that created the record. Census records are created nationally, but because of their volume, these searches are more easily tracked on a county level.
 - 4. **Local and town records** can be filed with the county unless the folder is too large. Records of a particular town could be put in a separate file.
 - 5. If a county file is too large, it can be further divided by record type. (census records, land records, vital records, etc.)
- E. Numbering the documents
Number each document and record that number in the “results” column of the research log. The research log becomes the table of contents to that file folder.
- F. When using an electronic research log, create links to the documents on your hard drive for easy access to the images.

V. Summary

- A. File every document according to the surname being searched.
- B. A woman’s documents will be filed by her maiden name prior to her marriage and by her married name after her marriage. Also, she will have other documents filed by other surnames if she had more than one marriage.

- C. File folders are organized alphabetically by surname. The files for one surname begin with the general surname file, followed by state files in alphabetical order, with the counties within each state alphabetically behind the state folder. Any county files broken down by record type are filed in the county position alphabetically by the type of record.
- D. Keep it **simple and logical**.
1. There is not one right way to organize. This is one possible method of organization, not **the** method.
 2. Be sure your system of organization can be quickly and easily understood by others. We all must leave our records behind at some point. If the files are too confusing to descendants, they may end up in the trash.
 3. Find or create a system that works for you. Don't spend excessive time organizing and reorganizing your files.
 4. Avoid making multiple copies of documents whenever possible. Avoid cross-referencing and creating the need to look in multiple files to locate a document.
 5. Be sure all electronic files are backed up regularly and that they are migrated to new formats, as needed.

Sample File Folders Organized by Surname, by Locality

Manila Folders

Bauer
Emerson
Lockwood - General Surname
Lockwood - Arkansas
Lockwood - Arkansas, Randolph Co.
Lockwood - Idaho
Lockwood - Idaho, Kootenai Co.
Lockwood - Idaho, Nez Perce Co.
Morey - General Surname
Morey - Illinois
Morey - Illinois, Bond Co.
Morey - Illinois, Fayette Co.
Morey - Ohio
Morey - Ohio, Knox Co.
Wilson - General Surname
Wilson - Illinois
Wilson - Illinois, Fayette Co., Census
Wilson - Illinois, Fayette Co., Land
Wilson - Illinois, Fayette Co., Misc
Wilson - Kentucky

Electronic Folders

Bauer
Emerson
Lockwood
 Arkansas
 Randolph
 Idaho
 Kootenai
 Nez Perce
Morey
 Illinois
 Bond
 Fayette
 Ohio
 Knox
Wilson
 Illinois
 Fayette-Census
 Fayette-Land
 Fayette-Misc
Kentucky

Sample Research Log

Morey Research Log
Marion County, Illinois

<u>Date</u>	<u>Call Number</u>	<u>Description of Source</u>	<u>Results</u>
1/3/10	FHL #1,010,512	Marion County, Illinois Death Index, 1877-1909. County Clerk. searched for Morey surname	1
1/3/10	FHL #1,010,513	Marion County, Illinois Deaths, Book 2, 1909-1915. County Clerk. searched for Albert Morey	Nil
1/3/10	Ancestry.com	1910 U.S. Census of Marion County, Illinois searched for L. A. Morey searched for Albert Morey [searched all of Patoka Twp]	2 Nil
1/3/10	Ancestry.com	1900 U.S. Census of Marion County, Illinois searched for Leonard A. Morey	3
4/12/10	FHL US/CAN 977.3 A3w	<i>A Reference Guide for Genealogical and Historical Research in Illinois</i> , by Joseph C. Wolf. Detroit: Detroit Society for Genealogical Research, 1963. searched for Marion County entries	4
4/12/10	FHL US/CAN 977.3 H2ma	<i>Index to History of Marion and Clinton Counties, Illinois</i> . Salem, Ill: Marion County Genealogical and Historical Society, 1986. searched for Morey surname	5
4/12/10	FHL #928,184 item 5	<i>History of Marion and Clinton Counties, Illinois</i> . Philadelphia: Brink, McDonough, 1881. searched for Lyman H. Morey entry	6
4/12/10	FHL #1,000,502 item 3	<i>Brinkerhoff's History of Marion County, Illinois</i> , by J. H. G. Brinkerhoff. Indianapolis, Ind: B. F. Brown, 1909. index searched for Morey surname	Nil
5/8/10	By phone (618) 548-3400	Marion County, Illinois County Clerk search for death record of Albert Morey	Nil

Format:	font margins tabs	Arial, 11 pt. 1" .9", 2.2", 5.9"	Note: The results could also be a file name with a hyperlink to an image on the hard drive.
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