

Get it Together: Organizing Your Family Research

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One of the most important things you can do for your family is to preserve your family history. How many times have you wished you got the information when someone was still alive. When one of your relatives dies, it is like a library that burns down. Sure, some things can be replaced but it is a lot harder and takes a lot more effort to restore the histories, knowledge and photos of our ancestors.

Your family history is of little value to others unless you publish it so it can be shared with your family, your descendants, and other genealogists. This can be anything from typing up information that you have gathered, listing your sources and making copies to distribute to other family members, to having a professional book published. Decide to publish what you have for a specific line or several lines. After that goal is completed, begin preparing material for additional lines. Set a long-term goal with a reachable deadline. (This will also help you receive data and family information from people, if they are submitting it to you).

Your first step in researching your ancestors is to get organized. Here are some basic definitions you should be familiar with before starting:

- **Pedigree chart:** a chart that shows direct line ancestors only from a starting person going back in time 4, 5, or 6 generations
- **Family Group Record (FGR):** a chart recording events for one specific family and its members.
- **Ancestor:** a relative from whom you are directly descended such as a parent, grandparent, great-grandparent, etc.
- **Descendant:** a relative directly descended from you such as a child, grandchild, great-grandchild, etc.
- **Collateral Lines:** relatives related to you through blood or marriage that are from your extended family such as aunts, uncles, cousins, etc. (*Note – sometimes the only way to prove a connection is through a collateral line, then by proving your connection to that person*).

How do I fill out the Pedigree chart?

Start with yourself as person number 1. Include all known information.

- The standard way to write dates is DD-MON-YYYY or 17 Apr 2012.
- Write out your places for the vital events as Town/City, County, State, Country. **Do not abbreviate the places.**
- If the event occurred in a township then write, “Turtlecreek Township, Warren, Ohio”
- If there is no known town, city or township, then write: “Warren County, Ohio”

Men are always recorded on the top and women below. So person number 2 on your chart would be your father. Person 3 would be your mother. Person 4 would be your father’s father or your paternal grandfather. Person 6 would be your mother’s father or your maternal grandfather.

How do I fill out a family group record?

Include all known details. If you don’t know it leave it blank. If a child died young you should still include them. You should have a family group record for each family, even if no children resulted from a marriage. If children were born out of wedlock, FGRs can be included for them too; just make sure to indicate they were not married.

Organizing Your Research

So what is a good way to get started?

- Start with yourself and your immediate family. Gather everything you can. Scan pictures, letters, biographies, newspaper clippings, etc. at a high resolution so it will be easier to share with other family members when you are done.
- Store a duplicate copy of all your digital genealogy files and data to an online storage site such as DropBox
- Once you've gathered information from immediate family members, expand and start gathering and collaborating with extended relatives. This can include contacting relatives who have family trees on genealogy websites. Make sure to keep a list of what information, photos or stories you got from each relative.
- Get a DNA test done. Watch for sales after conferences or on holidays. DNA tests vary by company. I prefer the following companies for the listed reasons:
 - Use Ancestry.com DNA autosomal test to make contact with extended living cousins. Many people use Ancestry.com for genealogy research and are interested in connecting with their relatives so researchers have a good chance of finding someone who relates to their tested DNA that will want to swap research details. Use the DNA Matches to see how you relate to others who may or may not have their trees online. If they have a tree, see if any of the names match your known family names. If you have your tree on Ancestry.com and you are linked to your DNA it will show what circles you belong to and how you relate to those DNA matches.
 - Use FamilyTreeDNA for surname studies. This company is really good if you want to see if you relate to a specific surname because of how they report the DNA test results. They offer autosomal (atDNA), mitochondrial (mtDNA) and Y-chromosome (y-DNA)
 - Use 23andMe tests all types of DNA but they are really good at identifying diseases resulting from mutated DNA.
- Put together a research binder with related folders on your computer.
- Type the information into a genealogy database program such as RootsMagic. If you don't have a database already see if a relative will send you a gedcom so you can get started. If you have a family tree on FamilySearch you can transfer the tree to Ancestry.com then download a gedcom from Ancestry.com that can then be imported into RootsMagic.
- Research backward generation by generation and verify all facts provided by your relatives.

The method of creating books as described below is one of many ways to share your family information. These books are "works in progress" and are your working binders for researching your family lines. Don't add unproven details to online family trees. Use the binder to arrange your research and type the source details and facts into your genealogy database program as you go. Remember to submit stories or other interesting family details to your local and state genealogical society to be included in their quarterly publications. Submitting materials to quarterlies such as *Heir Lines* for the Warren County Genealogical Society area is a great way to share your research and make contacts with distant relatives. Many state and local genealogical societies have special requirements to honor early ancestors who settled in the area. After completing your research binder, you might find you qualify for local or state lineage societies such as "First Families" or "Early Settlers" or national societies such as DAR or SAR. If you follow the method for arranging your research binder you will have everything you need to submit an application to these lineage societies.

Getting Organized

This is probably the most important step you can do (and the hardest for some people). There are many ways to do this. What might work great for one person might not work well for someone else. You need to figure out what method works best for you and stick with it.

Organizing a Research Binder

A research binder is a “work in progress” as you trace your ancestry. There are two formats I use for my research binders: an **ancestor book** and a **descendant book**. Both have similar requirements but different end goals. For both books you will need the following: a 3 ring binder (at least 2 inches thick); a box of acid-free page protectors; tab dividers (the larger ones that will work with page protectors or the sticky tabs you can add to a page protector); cover sheets / title pages for each section of your book (handed out in class); 5-generation pedigree chart; family group records (FGRs) for each of the 5 generations listed on your pedigree chart (if you have an unknown generation, then print a blank FGR).

Ancestor book

The ancestor research binder will have 16 sections or chapters, which start with you in chapter 1 and follow your direct ancestors to your 2nd great grandparents. Each chapter or generation will be assigned a number to help you keep organized. This numbering is not the same as the numbers on the pedigree chart. Start with yourself as chapter 1. Do not go to an earlier generation until you find and verify details for everyone on the pedigree chart for the chapter you are working on. For a chapter to be complete you need to have a completed FGR (this means you need to find dates and places for everyone on the FGR including children and their spouses if they married), a biography (you can write this if there is none available), pictures (if you can find them), and copies of relevant documents.

Create a folder on your computer. Name it after yourself or the family surname you are tracing. Within that folder create sub-folders 1 through 16 for each of the chapters in your research binder. Within each numbered subfolder create more folders to organize your facts: vitals, burial, census, probate, land, military, bios, photos, and children. For the children folder I create subfolders and label them by the birth year of the child then the surname (or married surname) then given name. For the chapters that relate to the 2nd great grandparents (5, 6, 8, 9, 12, 13, 15, 16) I create a parents folder if I want to do more research on their ancestry. As records are found they are filed in the applicable folders.

Relevant document needed for each chapter (if they exist)

- Vitals (birth, marriage, death, divorce)
- Census
- Probate (wills, estates, etc.)
- Burial (obituaries, tombstone photos, funeral home records, cemetery interment records)
- Military (service records, unit histories, discharge papers, etc.)

Other optional records to include (most make biographies more interesting)

- Deeds & land transactions
- Court records
- Tax records
- Bible records
- Church records
- County Histories

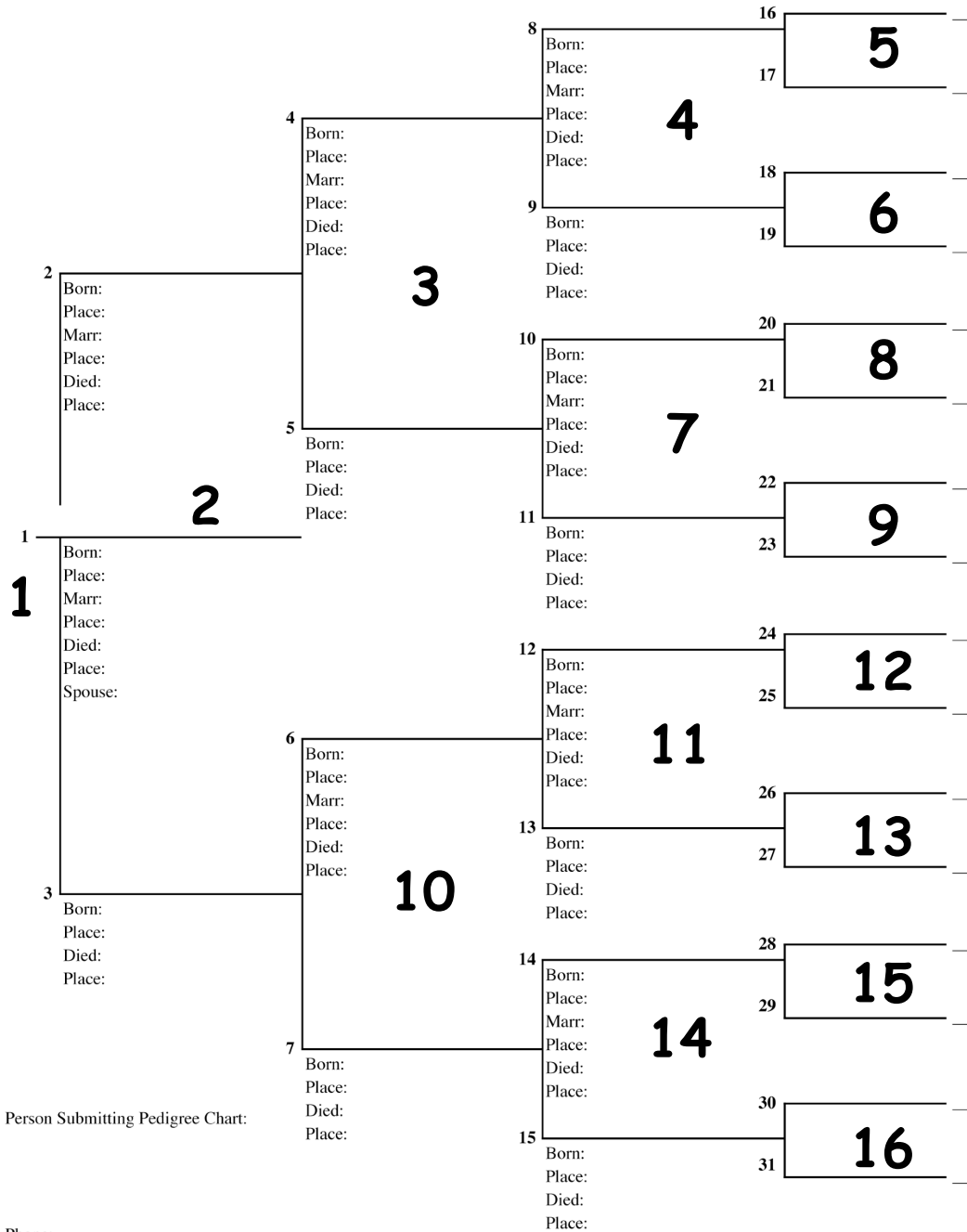
What about children of the people who aren't my direct line? What do I do with them?

This depends on your goals. If you plan on sharing the information in book format then their information can be included in a descendant book; otherwise keep the information filed on your computer and facts in your genealogy database software file.

PEDIGREE CHART

Chart No. ___

Person Number 1 on this chart is the same as no. ___ on chart no. ___



*The bold numbers refer to the section in your ancestor book.
Each section is organized by family for the direct ancestor numbered for that section.*

Descendant book

This book is organized similar to an ancestor book except that you start with your main or immigrant ancestor and include descendant chapters based on the number of generations you want to include. If I want to include 4 generations then I would have four chapters with many sub-chapters for the children, grandchildren and great-grandchildren. The same documents are gathered and research is done for a descendant book as for an ancestor book. One item I like to include is a “*How They Met*” article for the couples. I think these are always fun to read if you can discover more about their courtship.

The section dividers should be used to divide by each generation. Generation 1 would include information on the parents including their complete FGR, biographies, how they met, emigration (if they came from another country), and copies of primary documents relating specifically to the parents and any children who died young. Generation 2 includes information about the children of the parents in generation 1. It should be organized from oldest to youngest. Sections can be included for those who never married but lived to adulthood. I generally include information for unmarried children who died young in their parents’ biography. But they would have their own folder on my computer.

I like to use the *modified register numbering system* for the descendant book. This system starts with the number 1 for the ancestor and assigns numbers for each descendant that is married. Many genealogy databases have this numbering system built into their reports. Create a report for the number of generations you want and save the file as a rich text file. Open the rich text file up into MS Word and then SAVE AS a word file. You can then adjust numbering and the text as needed. I use the converted MS Word file as a template for the descendant books I create. It’s easy to do and makes organizing more manageable.

On the computer I create a folder after the generation 1 ancestor similar to an ancestor book (vitals, census, burial, probate, court, land, military, photos, bios, children). Since this is a descendant book I will trace downward using the children folder. Just like the ancestry book, for the children folder I create subfolders and label them by the birth year of the child then the surname (or married surname) then given name and include the same folders as I did for the parents. You can keep going down by using the children’s folders as much as is wanted.

What’s Next?

This depends on your goals. The research binder is designed so that if you follow the steps you can use the information to submit for lineage societies if you qualify, share the information with other relatives, or publish a family book. If you want to further research a family line, an additional book can be created and the process can be repeated.

Descendant Book Example

Here is an example of how I set up a descendant book for my Heiner family that came from Germany to the USA in 1845.

First Generation

- Johannes Heiner & Eva Maria Gögel
- Johannes Heiner & Anna Susanne Elisabethe Hundorf

Second Generation

- Christina Marie Heiner Dittmar
- Katherina Elisabetha Heiner Reif
- Johann Heinrich Heiner
- Matthaëus Heiner
- Johann Martin Heiner
- Eva Margarethe Heiner Petzsch

Third Generation

Anna Eva Dittmore Herbst
Henry Dittmore
Mary Christina Heiner Hinckley
Amelia Heiner Black
John Heiner
Anthony Heiner
George Heiner
Elizabeth Heiner Grover
Daniel Heiner
Susannah Catherine Heiner Ovard
Robert Petzsch
Mary Petzsch Suessman

Fourth Generation

Henry Herbst
Mary Elizabeth Herbst Fuller
...

I have 78 people listed in the fourth generation (great-grandchildren of the people in the first generation). I would not recommend creating a descendant book more than 4 generations because it gets large very quickly.

Organizing Your File Folders

File folders can be used for long-term and short-term storage of genealogy research.

- ❑ Purchase a box of colored file folders (5 colors)
- ❑ Select a color for your immediate family and a color for each of your four grandparents.
- ❑ When you begin to research a family, select the corresponding color file folder and label it with the parents names (Example: Johann Martin HEINER & Adelgunda DIETZEL)
- ❑ Print out a FGR for this family and place it along with a research log into the file folder. Use this FGR as your master and place original copies in this folder. Make sure to record all searches on the research log and use your binder as your work in progress.
- ❑ Include research information on the children in this family in the parents' file folder until you establish a marriage and family information for the children. Then create new folders for their families.
- ❑ Use the folders designated for your immediate family to file certificates and documents pertaining to you, your spouse, and each of your children. Important records such as birth certificates should be stored in a safety deposit box or fireproof container with photocopies in your file folders.
- ❑ Note: Create the files as you go. You don't need to have a folder on a family until you are ready to research them. Also you can purchase paperclips to attach to the folders so the papers all stay in order.

Organizing Your File Box

File boxes can be used to organize genealogy materials you are working with that are not ready for long term storage.

- ❑ Acquire a small file crate or box that you can keep by your computer for your working files
- ❑ Prepare enough hanging file folders (any color is fine) to put your research folders in. Label them alphabetically or by surnames and place them in your box.
- ❑ Organize all of the folders of the same color in sections of your file box. For example, file all misc. folders in Section 1, all yellow folders in section 2, all blue folders in section 3, etc.
- ❑ You will also want to have manila file folders for other research purposes such as research logs, census records, and other forms. To begin with place blank folders in your box and label them, as you need them.
- ❑ Gather your research supplies and put them in a container by your computer. Markers, pens, pencils, magnifying glass, paper clips, stapler, etc.
- ❑ Hint: File papers as you go. It is frustrating to have stacks of paper all over and it makes it hard to organize your info. You may forget you have an important piece of research because it is not in the proper folder.

Organizing Your Computer Files

Your computer can be a very efficient tool to organizing your family records. There are many ways to keep your documents organized. Here how I like to keep my computer files organized.

- ❑ Create a NEW FOLDER on your hard drive
 - To create a folder for yourself on your hard drive. Open your hard drive on the computer. Click on the start circle icon on the bottom left or double click on the "My Computer" hard drive icon on your desktop.
 - For PC computers select COMPUTER from the start menu, and then select your local disk (usually the C drive). There should be a menu bar at the top of that open folder saying either FILE or ORGANIZE, click this and then select NEW or NEW -> FOLDER. Name your folder and you are ready to go.
 - For Macintosh computers double click on the hard drive icon on your desktop or click on Finder. Once the folder is open click on FILE at the top left part of your screen and choose NEW FOLDER. Name your new folder.
 - The new folder will probably be stored in the "My Documents" folder on your hard drive. Name it after yourself.
 - Make an alias shortcut to this folder and put it on your desktop for easier access.

- Once the main folder is created in the “My Documents” folder on my hard drive, I create a sub-folder in the folder called “Genealogy” to file my genealogy digital files. You can add other sub-folders to the main folder as needed.
- Organizing Sub folders
 - Create subfolders broken down and arranged by the numbers relating to the sections in your research binder. Each subfolder will contain folders to organize documents and genealogy information. List one of the identifying ancestors
 - GENEALOGY
 - 01-myself (person number 1 on pedigree chart)
 - 02-my father (person number 2 on pedigree chart)
 - 03-my paternal grandfather (person number 4 on pedigree chart)
 - 04-my paternal great-grandfather (person number 8 on pedigree chart)
 - 05-my paternal 2nd great-grandfather (person number 16 on pedigree chart)
 - 06-my paternal 2nd great-grandfather (person number 18 on pedigree chart)
 - 07-my paternal great-grandfather (person number 10 on pedigree chart)
 - 08- my paternal 2nd great-grandfather (person number 20 on pedigree chart)
 - 09- my paternal 2nd great-grandfather (person number 22 on pedigree chart)
 - 10-my maternal grandfather (person number 6 on pedigree chart)
 - 11-my maternal great-grandfather (person number 12 on pedigree chart)
 - 12-my maternal 2nd great grandfather (person number 24 on pedigree chart)
 - 13- my maternal 2nd great grandfather (person number 26 on pedigree chart)
 - 14- my maternal great-grandfather (person number 14 on pedigree chart)
 - 15- my maternal 2nd great grandfather (person number 28 on pedigree chart)
 - 16- my maternal 2nd great grandfather (person number 30 on pedigree chart)
 - For each numbered folder I have folder with categories of research as follows:
 - GENEALOGY
 - 10-LesterHubbard
 - Vitals
 - Census
 - Burial
 - Probate
 - Bios
 - Photos
 - Children
 - Sometimes I will also have folder for military, land, tax, court and other such topics. Additional folders are determined by if I have research to file in that category or not.
 - Folders 5, 6, 8, 9, 12, 13, 15, and 16 also have an additional folder called “Ancestors”. I use this “Ancestors” folder to file research I have gathered for the ancestor of the numbered folder. These folders will have an ancestor sub-folder with details on the person’s parents and his wife’s parents, since they don’t have a separate number in the 5-generation organizing system.
 - Children are listed by birth year then married surname then given name and filed in the “Children” folder. They will have the same folder categories as their parents. If they have children, they will need a children folder too.
 - Naming files
 - Always download the transcription page, which provides most of the source citation details as well as the original image.
 - File the downloaded image in the applicable event folder for the specific person.
 - When naming the transcription/abstract page list it by the date of the event, who it is, then note “tr” at the end to indicate transcription. The actual record would not have the “tr” at the end of the name. For example “1850census-Heiner-Martin-tr” would refer to the transcription page of the 1850 census for my ancestor Johann Martin Heiner; where “1850census-Heiner-Martin” would refer to the actual downloaded census image.
 - Starting the name with the event year will sort these by date.
 - Don’t use spaces, slashes (/) or periods when naming your folders or files.