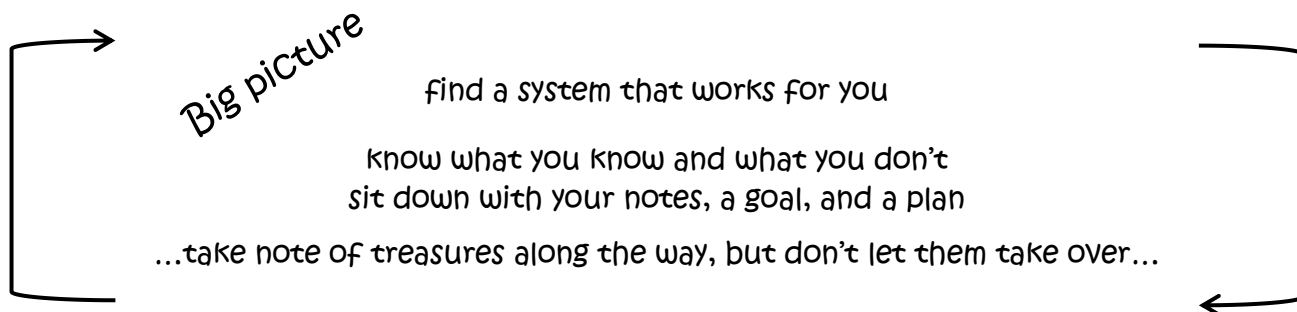


# Organizing your Research and Staying on Task

VBGS Education Committee

How-To Class

7 Sep 2021



## Your Filing System:

- what works for you?
  - > on paper, digitally, or a combination
  - > by place (city, county, country, etc.)
  - > by surname (file women by maiden name)
  - > by topic (books, census records, etc.)
  - > another method?
- if you change a file's name or location → does the change affect anything?
  - i.e. linking to digital records or a reference to the physical file location

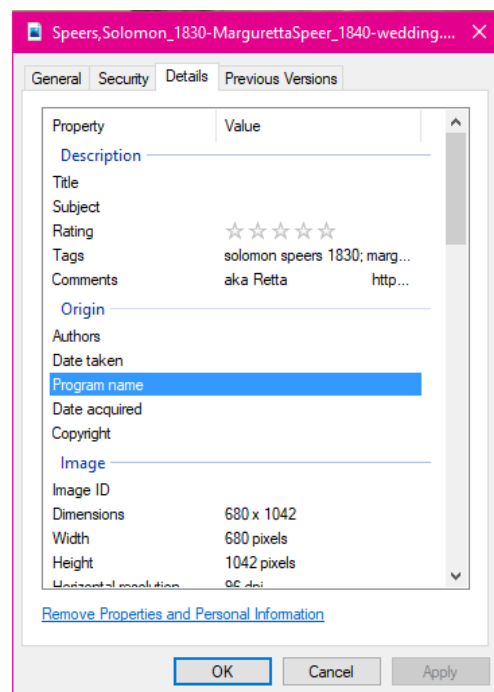
## Naming Digital Files:

again, find what works for you

- make filenames obvious to you
- include identifiers to distinguish between people of the same name (i.e., birth date, location)
  - > Bowman, Jacob\_1762-bur\_rec.jpg
  - > McKean, Laetitia\_1769-probate2.jpg
  - > FL-DaytonaBeach-1939-p74-75.jpg
  - > Lyon, Isabella\_1774-grave.JPG
- use the metadata for tagging and searching when able →
  - yes: .jpg, .docx, .xlsx --- no: .pdf, .txt
  - (if needed - save a copy as an alternate format to use metadata)

to enter metadata

- > open your file explorer (windows) or finder (mac)
- > select the file
- > open the metadata
  - windows - select *Properties* on the Home tab or right click and choose it there
  - mac - select *Get Info* or hit command + I
- > enter keywords and notes where able, these become searchable terms
  - windows – a tag line in the *Details* tab
  - mac – a tag box at the top
- > use the Comments line to enter any notes, citation information, and/or links
  - (in windows, use shift + enter to go to another line)



---- see 2020 Coffee Hour handouts ([digital](#) and [paper](#)) for more info and examples ----

## Research logs:

- helps keep notes organized and you on task
- can be on paper, digital, or a combination
- can be sorted by project, person, family, etc.
- Some things you can use logs for:
  - > track research for ancestors (what you have and want, where you can find it, search history)
  - > keep an inventory of your holdings (books, magazines, etc.)
  - > sort and track DNA cousins
  - > organize and track project progress
  - > record loss limitations (what's not available and you won't ever find – what else can you try?)
  - > bonus items you find while researching
  - > future tasks

Logs come in all different shapes and sizes -- Find what works for you!

logs can be:

small or large - forms – charts – spreadsheets – databases – documents – software notes

**Forms:** There are lots of free examples online. Try something out; if you don't like it, try another. Also, try using them as a template to customize one for your needs. These are just a few:

- [Date based log](#) – ordered by the date of research, space for notes
- [Research Checklist](#) by Thomas MacEntee – a 6-page checklist with potential sources to look for. Meant to be used for each person being researched.
- [Objective based log](#) – track your research for a certain goal. Found on FamilySearch, the form includes columns for date, source looked at, comments, and a few others.
- [Repository Information](#) – note information about a repository and items you'd like to look for

**Charts:** Use Pedigree Charts, Fan Charts, and Family Group Sheets to keep track of the big holes. Auto-populate and print these from your genealogy program or use forms such as these [free ones](#) from the National Genealogy Society.

**Spreadsheets:** Develop your own log with a program such as Google Sheets or Microsoft Excel. You can add hidden notes, links, multiple tabs, and more.

**Databases:** Using a database such as Microsoft Access or [Airtable](#) allows you to cross reference items within the database. This allows you to look at your information in various ways – i.e., by ancestor, by task, by repository – depending on how you build it.

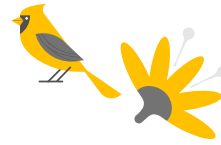
**Documents:** A simple list – on paper or in a digital document such as Microsoft Word or Google Docs – can be sufficient to record what you want to look for and your search process. Take it further by using a platform such as [Evernote](#) to build digital notebooks.

**Software Notes:** If you don't want anything separate from where you log your research, keep notes with each person. If available, use your program's note taking function.

## Staying on Task:

Don't get distracted by birds when you are looking for flowers.

- keep a log/list of everything you want to come back to
- make it easy on yourself:
  - > how find it again, note any links or citations
  - > if not obvious, why do you want to revisit this?
  - > who or what does it apply to
  - > basically, anything you think will be helpful later



## Short on time but want to do something?

Keep a list of small tasks to tackle when you are limited on time or aren't prepared for a big research session, such as:

- filing
- tagging digital files (metadata)
- scanning & sorting items
- translating
- transcribing
- revisit unsuccessful searches – maybe something new has been digitized or you may have learned of somewhere else to look
- cleaning up files, profiles, your database etc.
- take inventory of what you have
- update lists and logs
- read about a family location