

Organizational Strategies for Digital Research

Going Digital:

- Create / Use digital files for both documents and research
- Digitize documents currently in your possession
- Digitize each new acquisition
- Paper copies are for immediate use only

Establish Systems for Receiving and Storing Data:

1. NAMING system
for all documents to be used, referenced, and saved
2. RESEARCH system
to determine direction in research
to keep track of what you find and where you found it OR
to keep track of where you looked, regardless of what you found or did not find
3. STORAGE systems
for research in progress
for permanent storage

NAMING SYSTEM:

Name each digital document according to the following pattern:

LAST NAME, First Name, b year - Description

DUCK, Harrison, b 1841 - 1911 Letter naming his parents and siblings

Make each **description** “telling”.

- A description must make sense to YOU alone. It is for YOUR records. .
- A description can be several words long.

Place all digital files in the same folder

Results:

- Descriptions will distinguish one document from another and preclude your opening a file except when you want/need to use it.
- Computers (flash drives, etc.) will order records within a given folder - first by surname, second by given name, and finally birth year. (The addition of a birth year is optional but particularly helpful If there are two individuals with the exact same name.)

RESEARCH SYSTEM:

General Procedure:

- Work with families - one at a time
- Start with the family into which you were born and move back in time, family by family.
- Prove relationships. Find and attach documents (sources) for all members of a family.
- Find and document direct line individuals first.

Use 9-Fan Chart System:

- for Reference
- for Recording
- for Navigation in FamilySearch

Establish Desktop “Working” Folders entitled:

- To Do
- To Attach
- Attached

Capture “finds” with Screen Shots:

- Growl
- Snip it
- Irfanview

STORAGE SYSTEM

Establish a **Single Storage Place** for all documents used in your pedigree. This is imperative if you desire easy access to your stored documents.

Establish **Backup Storage** (dated and labeled as “Backup”)

- Flash Drive
- External Hard Drive
- CD

Establish a **Desktop folders** for temporary storage:

- of Current research
- of Surprise finds
- of Possible connections
- for URL addresses
- “interesting” data that may or may not prove to be relevant

WHAT TO STORE AND WHERE TO STORE IT

1. **Original Paper Documents** in your possession:

- Personal birth records • wills • memorials • Anything not available digitally
- Create and save a digital file of each document. (See Naming System).
- Save originals (documents only) - alphabetical order of course, in a notebook.

2. **System Generated Documents** that belong to the system where you have a tree:

- Census • County or State Records of birth, marriage, or death • Military • etc
- You need not save pertinent documents that exist on the site where you keep your pedigree. Instead, post each document digitally to the person(s) on your pedigree, as soon as you find it, and let the computer system save it for you.
- If you must save a particular document, save in your SOURCE BOX or SHOE BOX
- OR if you find a document that is just “interesting” or “perhaps relevant” in nature, store it temporarily in the TO DO folder on your desktop.

3. **Documents found on the internet:**

- Write-ups • stories • histories • etc
- Create a document file and onto it paste the internet data you wish to save.
- Also copy and paste the entire URL number on the same page.
- Name the file and add it to your TO DO folder on the desktop.
- OR reserve a page (file) in your TO DO folder just for URL numbers. Paste the address there along with a note telling what the page displays.

4. **Research Notes and Results:**

- Research Notes • Pedigree Charts • Family Group Sheets • other

Caution:

- In all cases use the same naming system.
- Avoid Multiple Folders - especially for Permanent Storage. One folder > easy access.
- Use, discard or file all screen shots at the end of each research session
- OR at the beginning of the following session.