



Going Digital

Chatham Community Library
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Frankly, if you are doing modern genealogy, you're *already* “going digital.”

Topics for today:

- What does it mean to “go digital?”
- Filing and file name systems.
- Metadata and media files.

Glossary and abbreviations

- Cloud storage: remote computer servers that you usually access through a web browser.
- Digital Asset Management is the tool set for managing digital items like pictures, scans, photos, videos, audio recordings, etc. Covers storage and metadata.
- GED or GEDCOM: Genealogical Data Communication. An open de facto specification for exchanging genealogical data between different genealogy software.
- Metadata: information about an object
- EXIF: Exchangeable Image File format. A standard for images, sound and metadata about those files.
- IPTC: International Press Telecommunications Council, a consortium of world's major news agencies. IPTC set a standard for simplifying distribution of information, primarily images and related metadata.
- OCR is Optical Character Recognition. Software that converts a picture of text into text that can be copied, pasted, searched and otherwise used by other software.



DGS: Desktop Genealogy Software

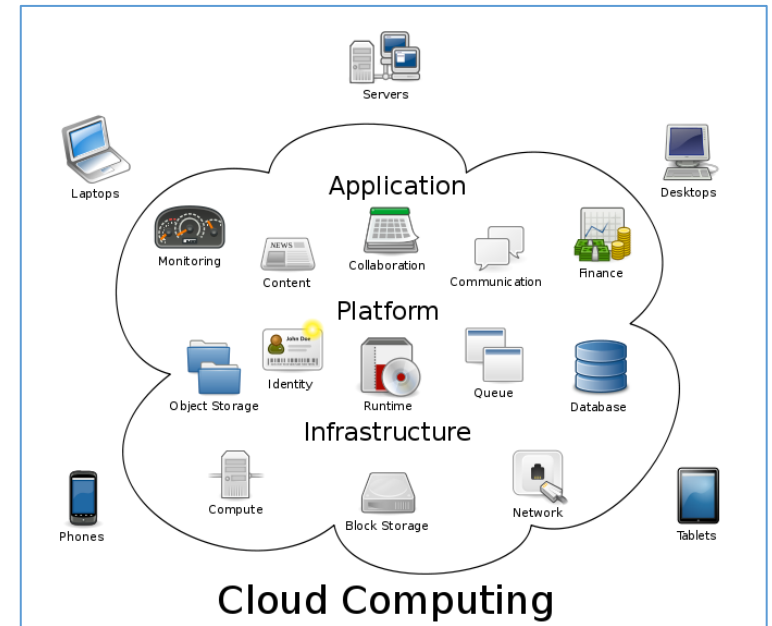
- Family Tree Maker (abbreviated herein as FTM). Closely associated with Ancestry.com.
- Roots Magic
- Legacy
- Family Historian

Things that are not DGS:

- Ancestry.com
- Familysearch.org
- DNA sites

What is “the cloud?”

- Simply, it is someone else’s computer that is physically remote from where you are.
- You access the cloud in the same way you talk to a distant person on the phone.
- Instead of a phone, you use a web browser or a synchronized folder on your computer.
- You can store, edit and retrieve files.



- Cloud providers:
 - Google Drive
 - DropBox
 - OneDrive
 - Amazon Drive
- Many online storage providers.





Why discuss the cloud?

- Many genealogy services live “in the cloud.”
 - Ancestry, Family Search, Find My Past
 - DNA testers and comparison sites
 - State, professional and personal genealogy sites
- Most desktop genealogy software gets hints from online providers.
- You may want to publish your family tree to the cloud for sharing and collaboration.
- Storing your genealogy data in the cloud is a good way to keep it safe.



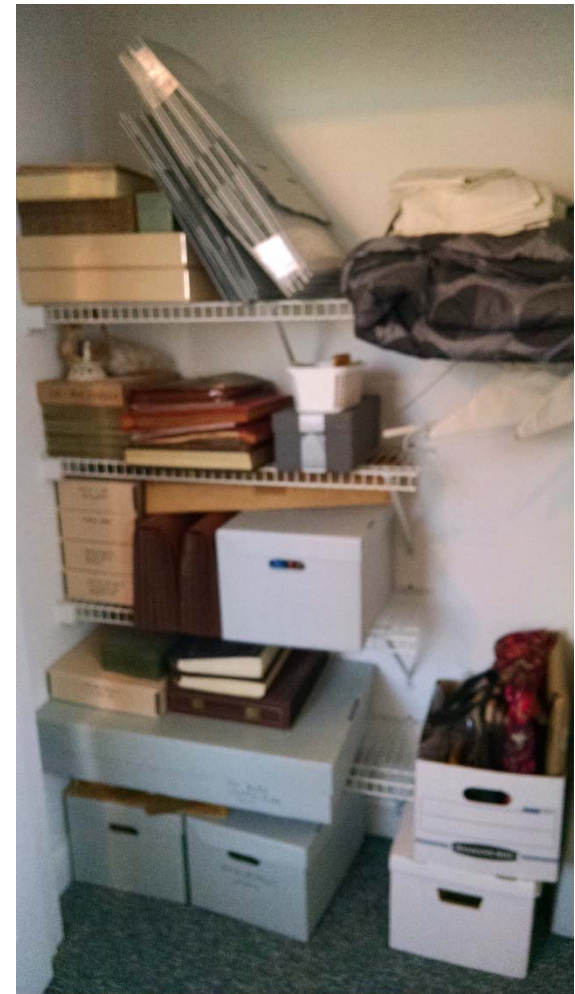
What does it mean to “go digital?”

- Favor electronica over paper
 - Work with paper, but file it and don't carry it around.
 - Keep electronic copies of everything on your laptop and use them in lieu of printing anything.
- Share genealogy information electronically
 - Invite people to your online trees
 - Export GEDCOM files and share with others
 - Build your own web site where collaboration occurs
- Use Digital Asset Management software for photos and videos, embedding metadata in the very file.
- Use electronic searching instead of relying on “Now where did I put that?”

Transformation to electronic

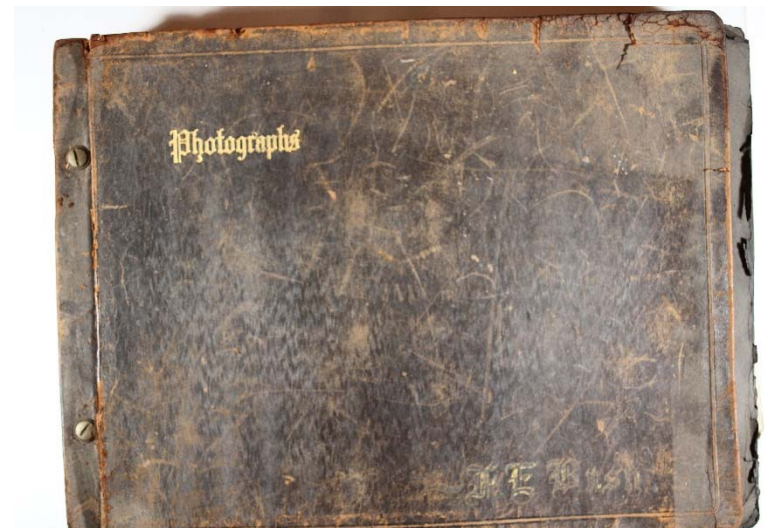
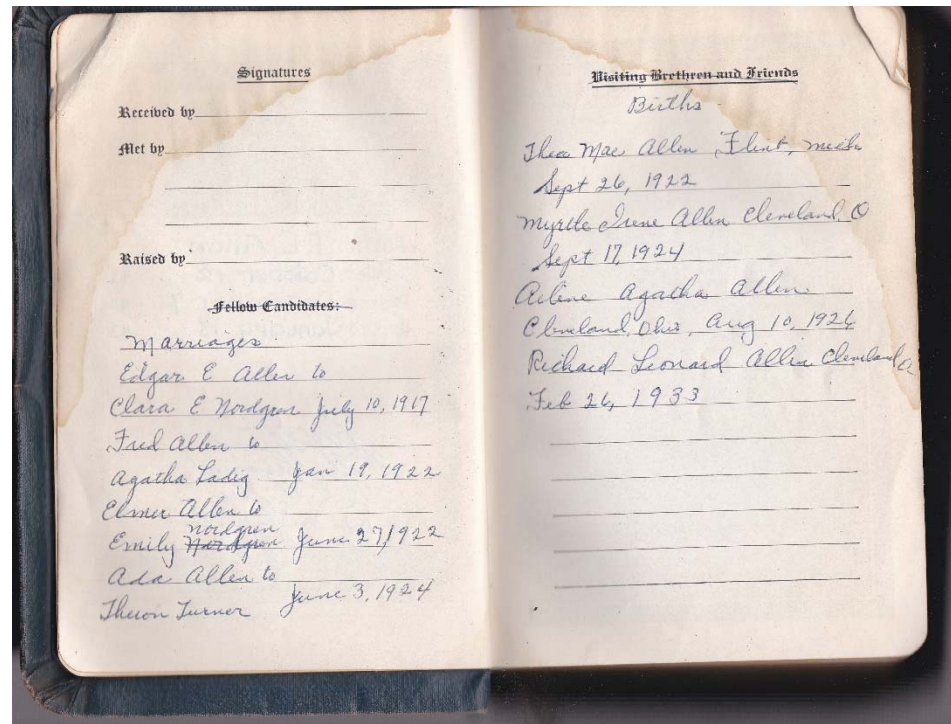
Paper-oriented item	Digital equivalent
Printed source material and photos	Digital files. Nowadays, almost everyone gets digital files online, and can create their own.
Your clipboard and list of notes	Evernote, OneNote, electronic lists and documents
Your physical desk	Your computer and genealogy programs
Your filing system	Your hard disk folder structure
Your filing cabinet	<ul style="list-style-type: none"> Your hard disk and back-up's Files in the cloud, e.g., DropBox, Google Drive and Ancestry.
Your card catalog or similar index to items	Photo metadata, file name conventions, electronic lists
Letters	Email

Even when you've gone digital, you will still have physical artifacts.



Digitizing artifacts is a method of preservation

- Delicate and fragile objects and documents should not be handled much.
- Using a digital representation helps preserve the condition and integrity of the object.
- Digitizing artifacts makes them readily accessible.





Filing and File Name Systems

- Where are you going to store your info?
- How are you going to find it?

For instance, my personal family archive comprises

- More than 26,000 images and 3100 files,
- And takes up 78 GB of hard drive space.

Deliberate organization is absolutely needed!



Filing system (not file name)

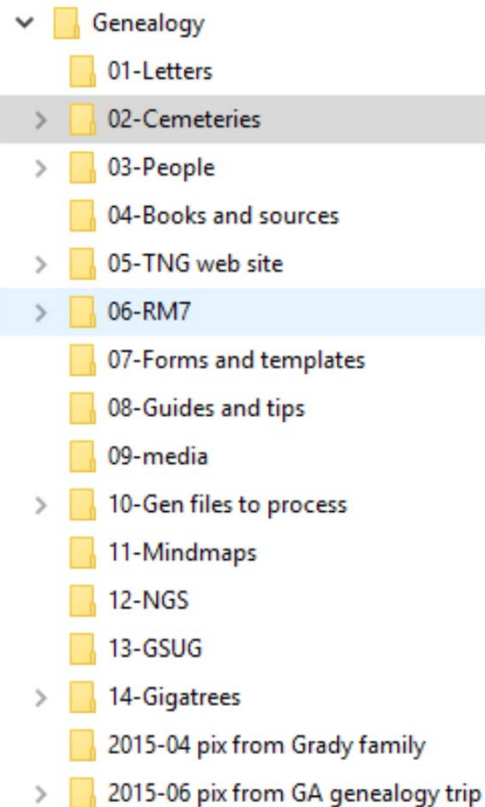
- Some people file by family, tree branch or person.
- Some people file by content, e.g., cemetery records, heraldry, funerals, marriages, census, etc.
- Some people put all electronic files in a single folder.
- Some people use a library management approach with accession or catalog numbers and a database.



What should be your filing system?

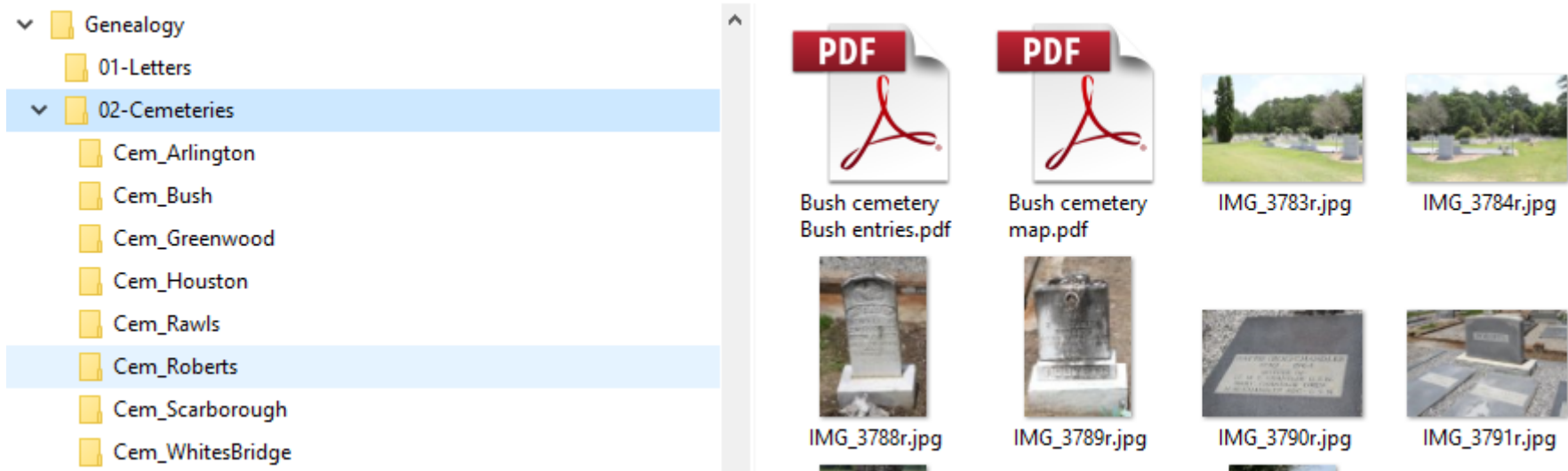
- How do you file your paper files?
- How do you find a particular item in your paper files?
- Where/ how do you keep your research list?
- How do you take notes as you work? Do you transcribe them?
- Will these same approaches work with electronic files?
- What can't you do with paper files that you think might be possible with electronic files?

Combination digital filing system



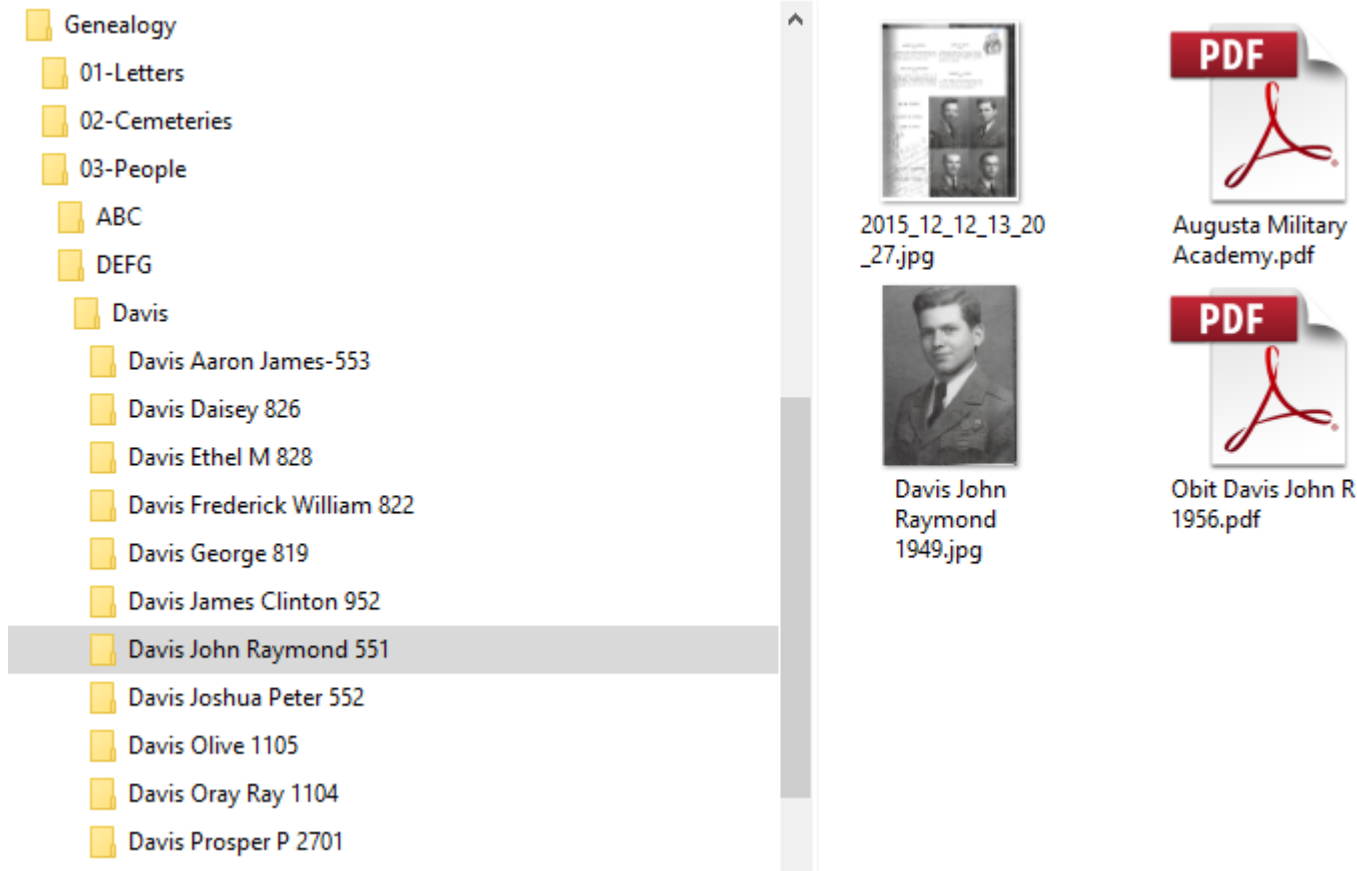
- The folder structure allows great flexibility.
- The numbers allow the folders to sort in any desired order.
- In this structure, the folder “09-media” is a hangover from FTM, which kept all its media in a single folder.
- Most items are in “03-People” subfolders.
- This system allows mixing of people, places and content.

Any location can be handled the way this system handles cemeteries.



- One folder for each place of interest, containing images, indexes, maps, histories, etc.

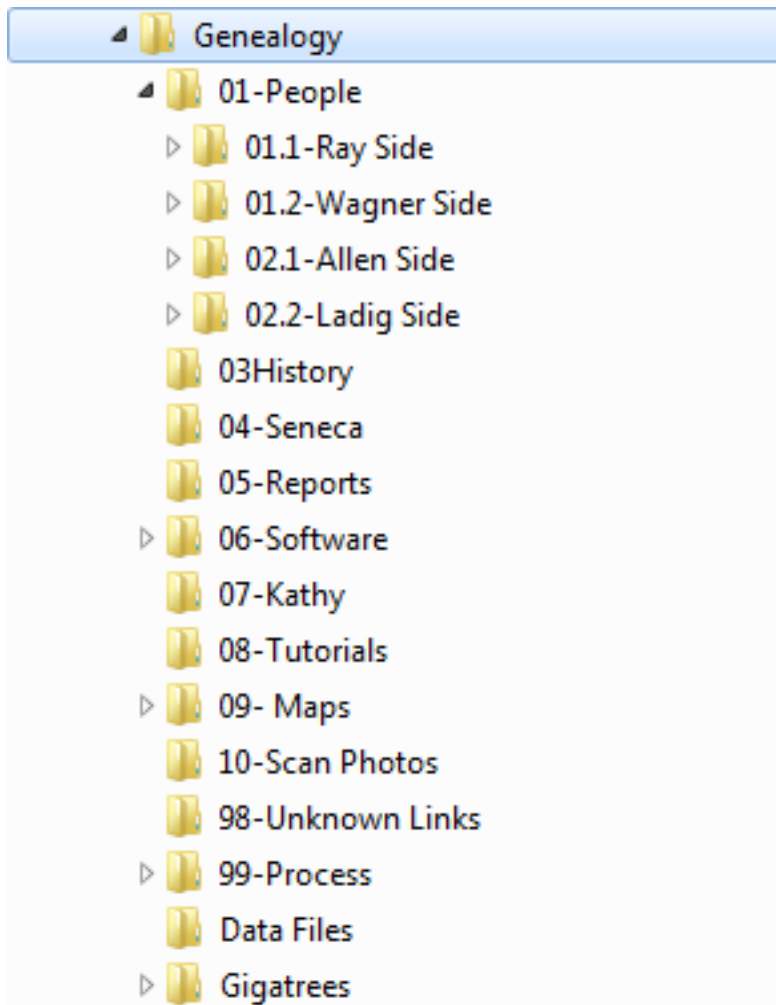
You can store genealogy items with the person to which they correspond.



The screenshot displays a file explorer interface. On the left, a tree view shows a hierarchy of folders: Genealogy, 01-Letters, 02-Cemeteries, 03-People, ABC, DEFG, Davis, and a sub-folder for Davis John Raymond 551. The 'Davis John Raymond 551' folder is selected and highlighted. To the right, the contents of this folder are shown: a photo of Davis John Raymond (1949.jpg), a PDF of an obituary (Obit Davis John R 1956.pdf), and a PDF of an Augusta Military Academy record (Augusta Military Academy.pdf).

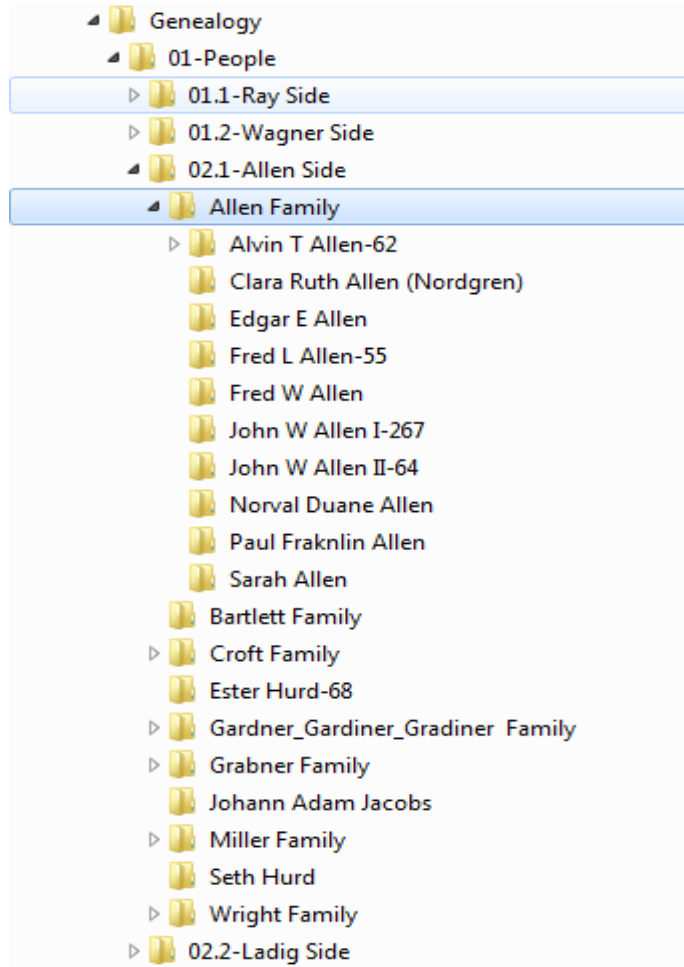
- Folder names can have a DGS reference number for the particular person.
- All media types can go in one folder for a particular person: pictures, census records, birth certificates, etc.

A different combination digital filing system



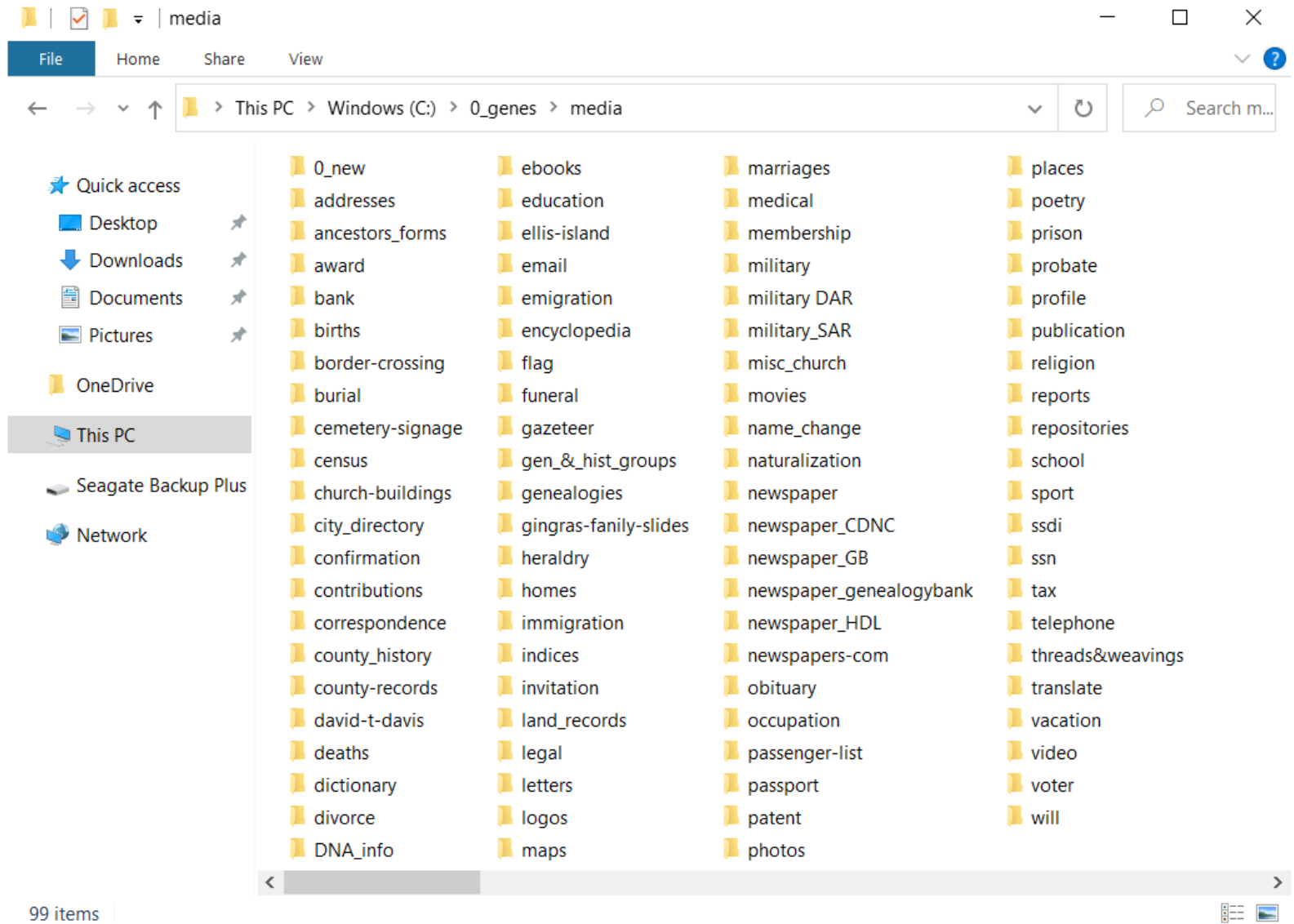
- This system allows mixing of people, places and content.
- It emphasizes different approaches.
- The “01-People” and “07-Kathy” folders are two different family trees.

Family priority in the second system



- This system prioritizes family at a higher sort level than person name.
- Numbers are used in the subfolder structure to force families to sort in a particular order.
- Note that this system lists people by given, then last name.
- The lack of a DGS reference number means a particular person is not yet entered in the DGS database.

Shallow/ wide by media type



The screenshot shows a Windows File Explorer window titled 'media'. The address bar indicates the path: 'This PC > Windows (C:) > 0_genes > media'. The left sidebar shows 'This PC' selected. The main area displays a grid of 99 folders, organized into four columns. The folders are: 0_new, addresses, ancestors_forms, award, bank, births, border-crossing, burial, cemetery-signage, census, church-buildings, city_directory, confirmation, contributions, correspondence, county_history, county-records, david-t-davis, deaths, dictionary, divorce, DNA_info, ebooks, education, ellis-island, email, emigration, encyclopedia, flag, funeral, gazeteer, gen_&_hist_groups, genealogies, gingras-family-slides, heraldry, homes, immigration, indices, invitation, land_records, legal, letters, logos, maps, marriages, medical, membership, military, military DAR, military_SAR, misc_church, movies, name_change, naturalization, newspaper, newspaper_CDNC, newspaper_GB, newspaper_genealogybank, newspaper_HDL, newspapers-com, obituary, occupation, passenger-list, passport, patent, photos, places, poetry, prison, probate, profile, publication, religion, reports, repositories, school, sport, ssdi, ssn, tax, telephone, threads&weavings, translate, vacation, video, voter, will.

99 items













File name conventions

- Make sure file names are meaningful, and consistently use the same convention throughout your filing system.
 - It should be apparent from the file name what is in the file (unless you are using a library management approach).
- File names should be as near unique as you can make them.
 - Many of us have multiple photos of the same person, so maybe put a date or serial in the file name.
 - Census pages are common to multiple people, so include some identifying information.
- We recommend including your DGS reference number in the file name of every file pertaining to a particular person.
- Decide how you want files to sort, then create the file name that way. Examples:
 - 1930 US census WV Ridgely Absalom 1402 (date first)
 - Census US WV 1930 Absalom Ridgely 1402 (type of record first)
 - Ridgely Absalom 1402 census 1930 US WV (name first)

What not to do

- FTM puts all its media into one folder and reuses names.
- Names are not unique.
- No clue to whom the media refers.

 1910 United States Federal Census(1).jpg
 1910 United States Federal Census(2).jpg
 1910 United States Federal Census(3).jpg
 1910 United States Federal Census(4).jpg
 1910 United States Federal Census(5).jpg
 1910 United States Federal Census(6).jpg
 1910 United States Federal Census(7).jpg
 1910 United States Federal Census(8).jpg
 1910 United States Federal Census(9).jpg
 1910 United States Federal Census.jpg



Library database filing system

- Unique files names, usually an alphanumeric sequence. Eliminates duplication.
 - File name may look like R00002541.pdf or 20161231-00987.jpg
 - File name may provide no clue to file contents.
 - File names can be related to accession sequence and collection.
- Database has metadata for each item:
 - Type of file: photo, census, burial, certificate, etc.
 - People in the item
 - Date and place
 - Comments and captions
- Search the database to find the file.
- Easy to link multiple people to the same file, e.g., census.
- Necessarily must use the library database in conjunction with your DGS.

Metadata and media files

Metadata is information about the item. For example, metadata about YOU might be

- Height, weight, hair color, physical characteristics.
- Where you've traveled.
- Which sports team you cheer.

Embedding metadata inside a file means it travels with the file and is less likely to get lost. One example is content keywords, including names of the people in a photo, when taken, etc.

Photo metadata

- Metadata can include:
 - Place and date
 - Camera information
 - People and category tags
 - Captions and comments
- Many digital cameras (including cell phones) record metadata
- Windows lets you read metadata from the file properties
- Many programs, some free, let you read and write metadata.

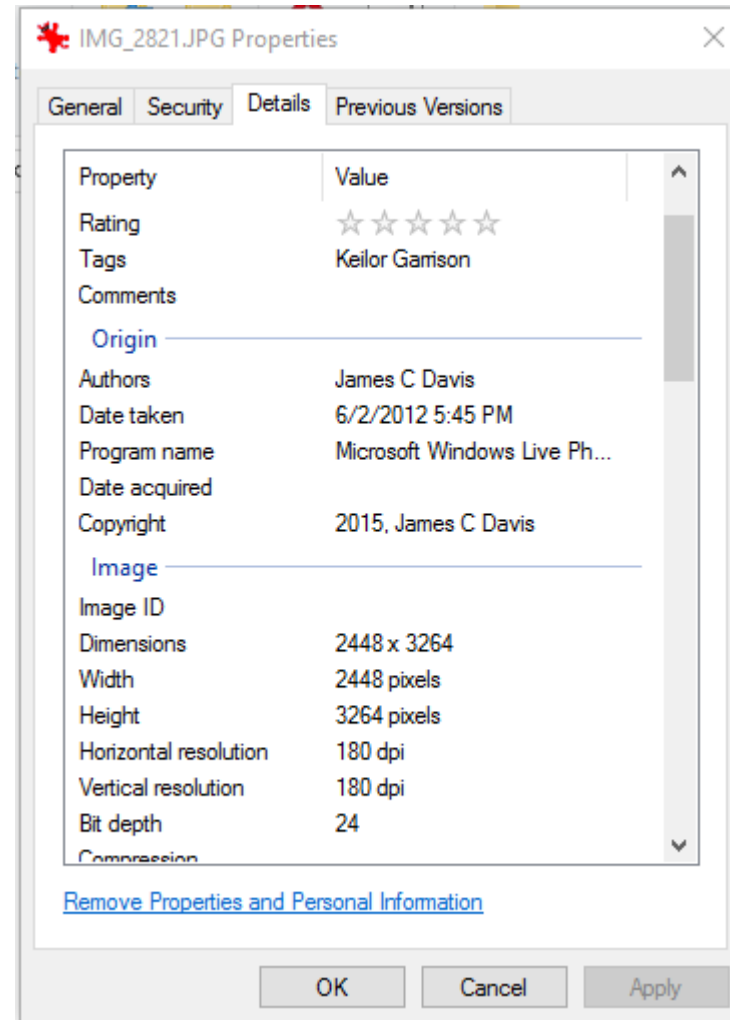




Photo metadata types

- IPTC information overlaps with EXIF, was created in 1990s for all media types and news items.
- EXIF information covers a broad spectrum of info about images sound and tags recorded by digital cameras. Created in 1995. GPS locations written by many cameras, including smart phones.
- XMP is the latest. Created by Adobe in 2001 to standardize digital metadata.
- All metadata is searchable with certain software, e.g., Adobe Lightroom.

Photo metadata read by IrfanView

IrfanView - Image properties

File name: IMG_2821.JPG

Directory: C:\Drive_L\FinalPix\2010s\2012\2012-0602 Prai

Full path: C:\Drive_L\FinalPix\2010s\2012\2012-0602 Prai

Compression: JPEG, quality: 90, subsampling ON (1x2)

Resolution: 180 x 180 DPI

Original size: 2448 x 3264 Pixels (7.99 MPixels) (3:4)

Current size: 2448 x 3264 Pixels (7.99 MPixels) (3:4)

Print size (from DPI): 34.5 x 46.1 cm; 13.60 x 18.13 inches

Original colors: 16.7 Million (24 BitsPerPixel)

Current colors: 16.7 Million (24 BitsPerPixel)

Number of unique colors: 241905 Auto count

Disk size: 1.62 MB (1,701,138 Bytes)

Current memory size: 22.86 MB (23,970,856 Bytes)

Current directory index: 17 / 56

File date/time: 2/27/2016 / 21:20:33

Loaded in: 140 milliseconds

IMG_2821.JPG - EXIF Info

EXIF Tag	Value
Filename	IMG_2821.JPG
Make	Canon
Model	Canon PowerShot SD1100 IS
Orientation	Top left
XResolution	180
YResolution	180
ResolutionUnit	Inch
Software	Microsoft Windows Live Photo Gallery 1...
Date Time	2012:06:04 16:14:28
Artist	James C Davis
YCbCrPositioning	Centered
Copyright	2015, James C Davis
ExifOffset	2262
ExposureTime	1/100 seconds
FNumber	4.90
ISOSpeedRatings	200
ExifVersion	0220
Date TimeOriginal	2012:06:02 17:45:52
Date TimeDigitized	2012:06:02 17:45:52
ComponentsConfiguration	YCbCr
CompressedBitsPerPixel	3 (bits/pixel)
ShutterSpeedValue	1/101 seconds
ApertureValue	F 4.91
ExposureBiasValue	0.00
MaxApertureValue	F 4.91
MeteringMode	Multi-segment

IrfanView - IPTC information

Description Keywords/Categories Credits/Origin Options

File name: C:\Drive_L\FinalPix\2010s\2012\2012-0602 Praine Home Companion\IMG_2821.JPG (File: 1 / 1)

Document title:

Author (byline): James C Davis

Author title:

Copyright: 2015, James C Davis

Caption: (description)

Caption writer:

Headline:

Special instructions:

Note for batch mode: Same IPTC can be added to all files (see Options-Tab)

Hint: allowed placeholders: \$D, \$d, \$F, \$N, \$O, \$T, \$U, \$S, \$C, \$Ex = EXIF, \$Ix = IPTC, I



How does your DGS handle media?

- In this slide, media means all the exhibits you've collected in your family history files.
 - Photos, census images, draft cards, property records, wills ...
- Does the DGS embed the media in the family history data file or link to an external file?
 - Roots Magic links only and can repair broken links.
 - FTM mostly embeds but can link. FTM likes to put all media in a single folder on your hard drive.
 - Others?
- Embedded files don't export to GED. The links for linked files do, but not the files.
- What program do you use? How does your program handle media?



Digital workflow: what steps do you follow? One example:

- Find a new source
- Create a digital file
 - Scan in paper or photo
 - Download a file from a web site
 - Combine documents and photos in a single file
- Give the file an appropriate file name per your filing system.
 - If using library management approach, enter the metadata about the file in your database.
- Store the file in the appropriate place on your hard drive within your filing system.
- Link or embed the file in the right fact, source or citation in your DGS.
- If a photo, embed desired EXIF or IPTC information in the file.
- Back up your digital assets!

Back-up, Back-up, Back-up!

More on backup schemes and technologies in the November session, but think how hard you've worked to collect all this family history. It would be terrible to lose it all to a computer failure or natural disaster.