



Beginning Genealogy: Session 2 Genealogy Organization

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Homework review

- Complete a family group sheet for the largest family you have in your tree right now.
- Complete a pedigree chart using yourself as the starting person. Take it as far back as you like
- Ensure you have a Family Search account (and others, if you like) and that you've entered your family as far as you can take it.
- What issues did you encounter?
- What did you learn?
- What holes did you find in your family history?
- Any questions on topics from last session?



Your Session 2 objectives.

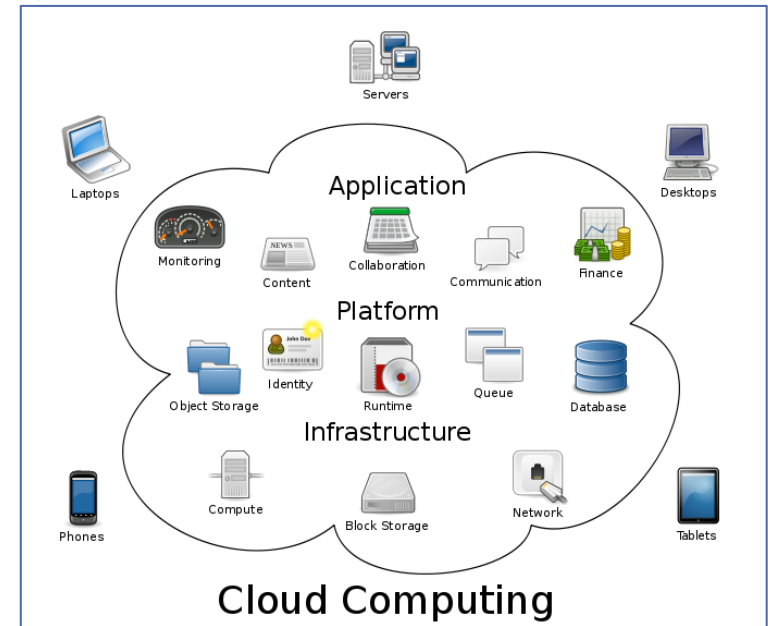
- Understand what is the cloud. Why not work solely in the cloud? (e.g., Ancestry.com or familysearch.org).
- Decide on your file organization and file names schema.
- Digitizing methods
- Digital workflow
- Participant successes and problems

Ask questions throughout!



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 (DGS) 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.

- Not many desktop genealogy software programs can work while connected to the cloud due to constant synchronization.



Family trees online

- Web-based programs provide the ability to put your family tree online. There are two types of online trees: personal trees and unified trees.
- Personal trees are managed by individuals, so each person can have their own tree that they manage. The same person can appear in multiple trees.
 - Ancestry and similar sites.
- Unified trees are trees in which each individual appears only once and changes can be made by multiple people (much like Wikipedia).
 - FamilySearch and WikiTree. Trees may have errors, and anyone can change anything.
- Web-based programs often provide both tree management and record searching, as well as DNA testing and cousin-matching.



Good reasons for DGS

- I recommend you work in a hybrid model of doing some work in the cloud and keeping your master data on your home computer!
- Pro's for the cloud:
 - Collaboration
 - Research engines provide many hits.
 - Family trees of other people can be searched.
 - DNA matches made across all the people in the database.
- Pro's for desktop genealogy software:
 - Privacy.
 - Control of data. You have it, you own it, no one can change it.
 - Ancestry claims ownership of all data entered to their platform.
 - The FamilySearch unified tree can be changed by anyone.
 - Data preservation, so long as you back up your data!
 - Once you buy it, it's yours without subscription fees.

We will discuss various DGS extensively in Session 3!



Really useful cloud sites

Site	Purpose
www.findagrave.com https://billiongraves.com	Millions of cemetery records. Free access and searching.
http://revwarapps.org/	Transcriptions of Revolutionary War pension applications.
https://www.archives.gov/veterans/military-service-records	Military service records requests.
https://theancestorhunt.com/blog/north-carolina-online-historical-newspapers-summary/#.XKdFEJhKiM8	Online NC newspapers listing
https://theancestorhunt.com/blog/free-north-carolina-online-church-records/	Free online NC church records
https://heritage.statueofliberty.org/passenger	Ellis Island passenger search
https://www.jewishgen.org/	Jewish genealogy
https://services.dar.org/Public/DAR_Research/search/	DAR genealogical research system
https://genealogy.uscis.dhs.gov/#/	US Citizenship and Immigration records search
https://probatesearch.service.gov.uk/#calendar	Find UK wills from 1858 to present

... and there are literally millions more! Google search is your friend.



Filing system and file names



Filing your data once entered

- Where are you going to store your info?
 - Filing cabinets, notebooks, boxes; versus
 - On your hard drive.
- How are you going to find it?
 - Search thru those notebooks and cabinets; or
 - Look at the person to whom it is linked.
- 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)

- You need to decide what will be your organizing principle for your data!
 - 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.



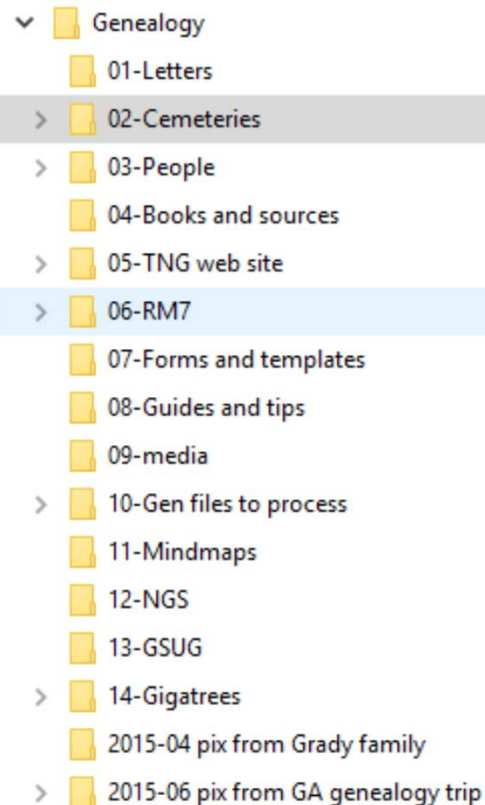
What should be your filing system?

- Questions to ask yourself as you decide how you will store your paper and corresponding digital files:
 - 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?

[discussion]

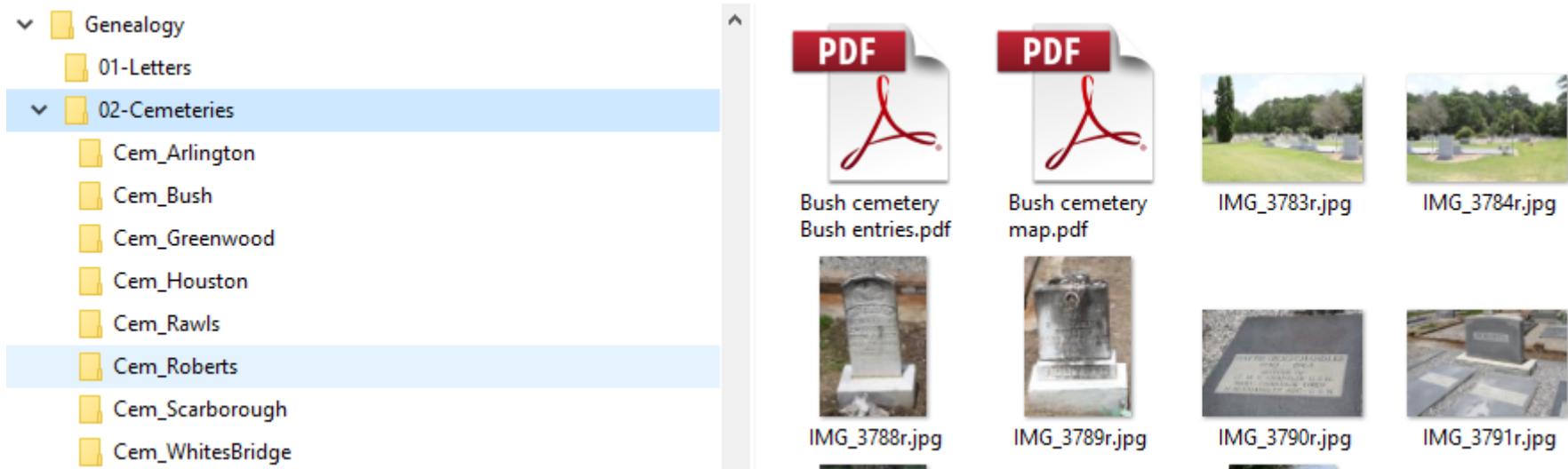


Combination digital filing system



- 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.

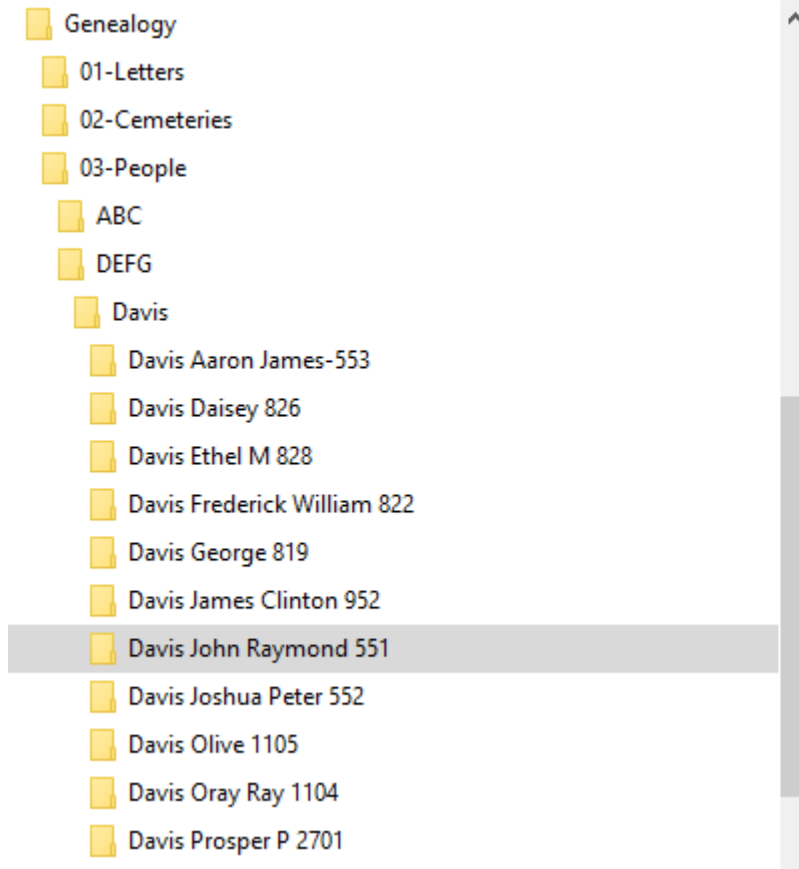
Any location can be handled the way this system handles cemeteries.



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



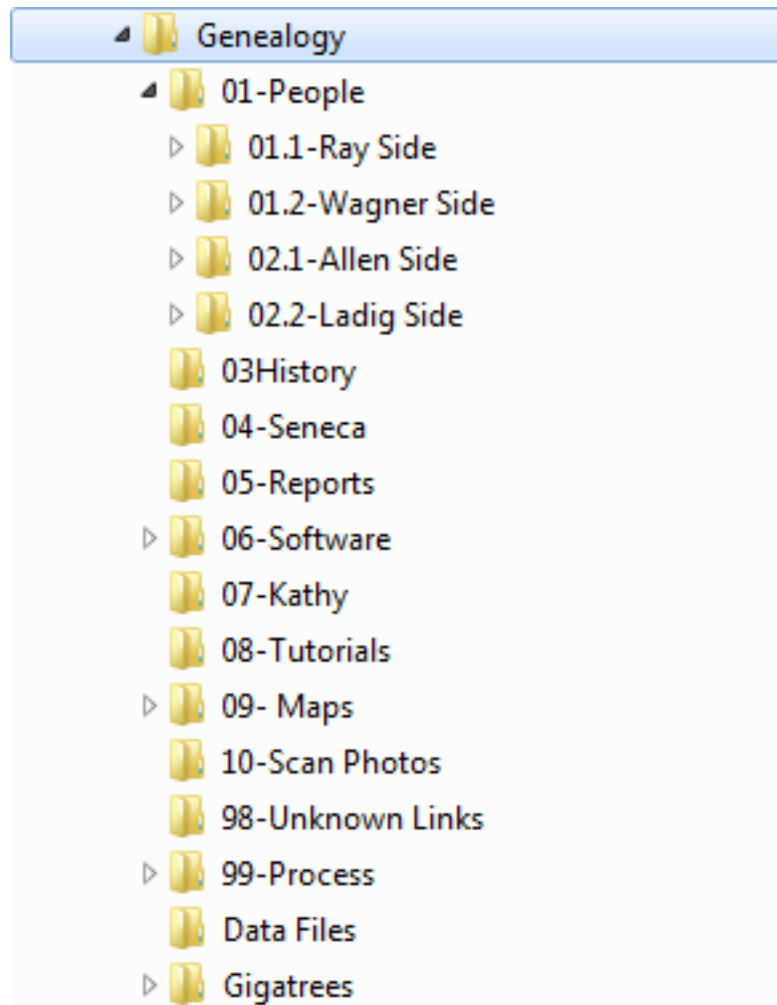
You can store genealogy items with the person to which they correspond.



- 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.



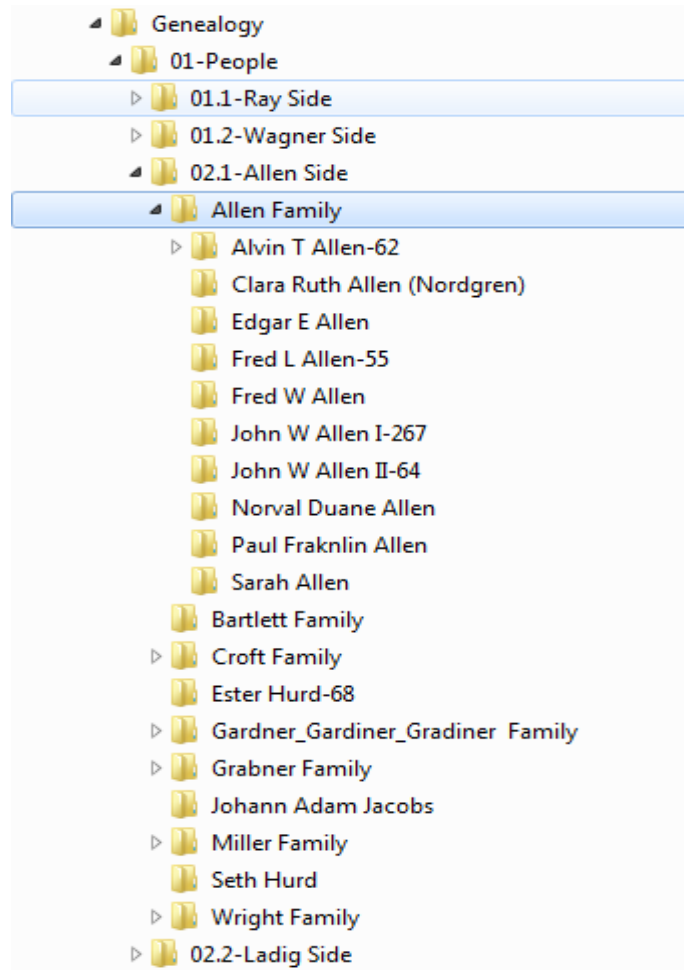
A different combination digital filing system



- 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.



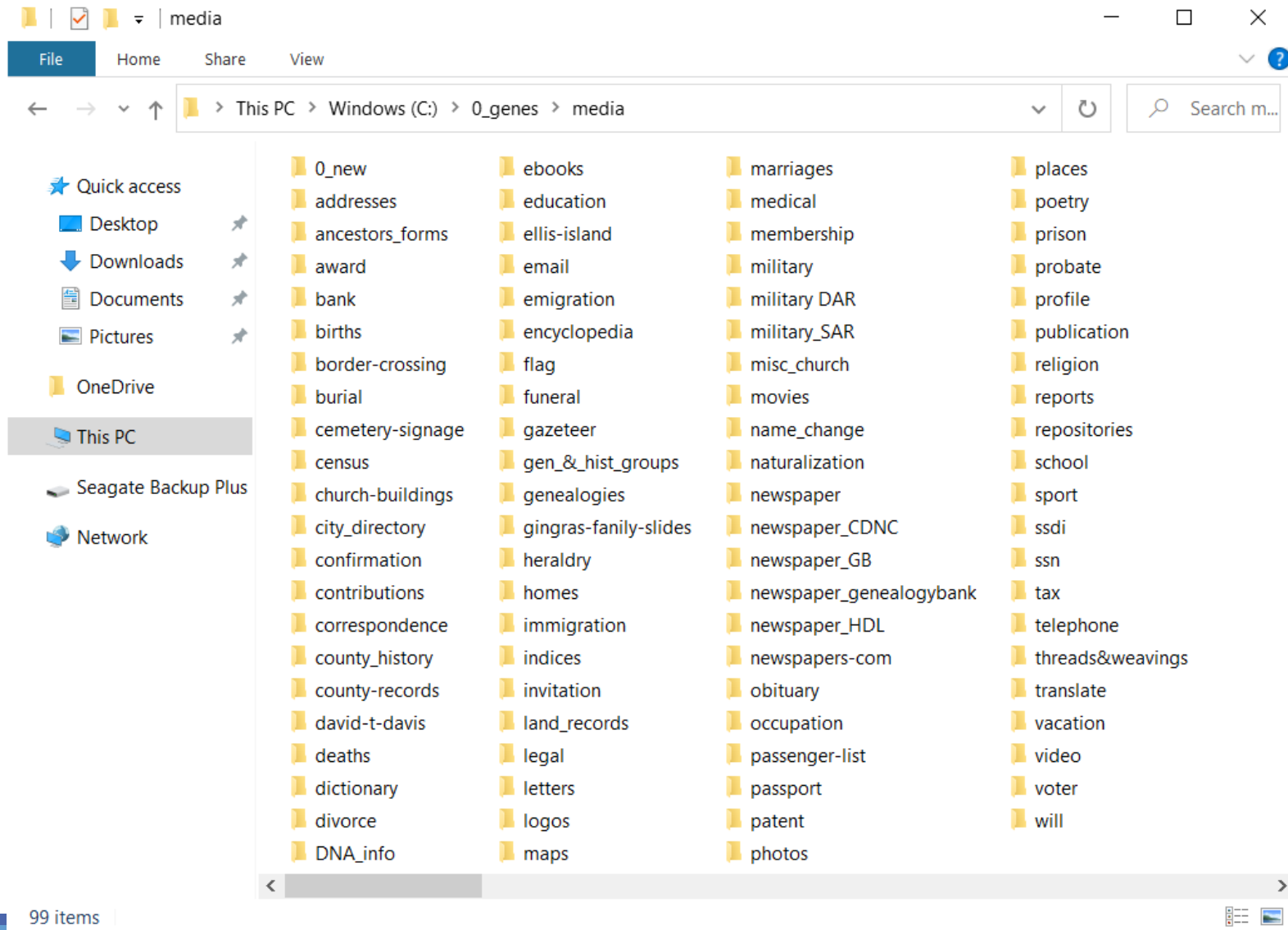
Family priority in the second system



- 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





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.
- I 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.
- Files are linked into the FTM facts by the software, so very useful there, but hard to answer questions like “please print a birth certificate for Uncle John.”

 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



How do I make digital files?



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

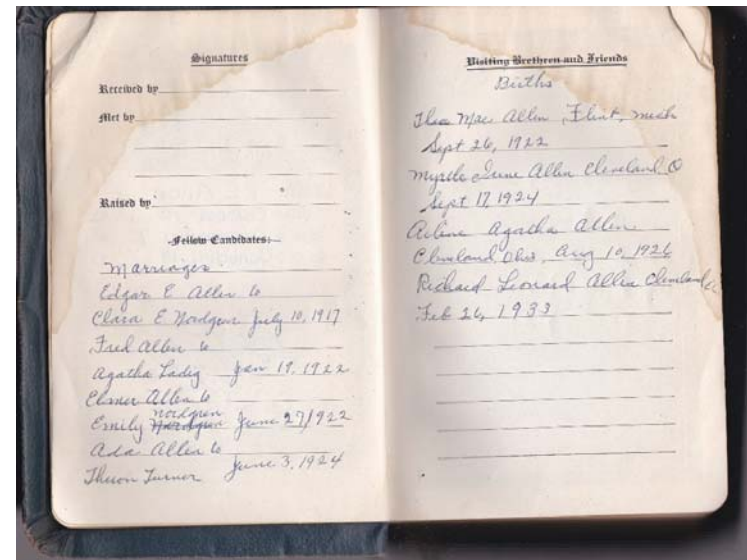
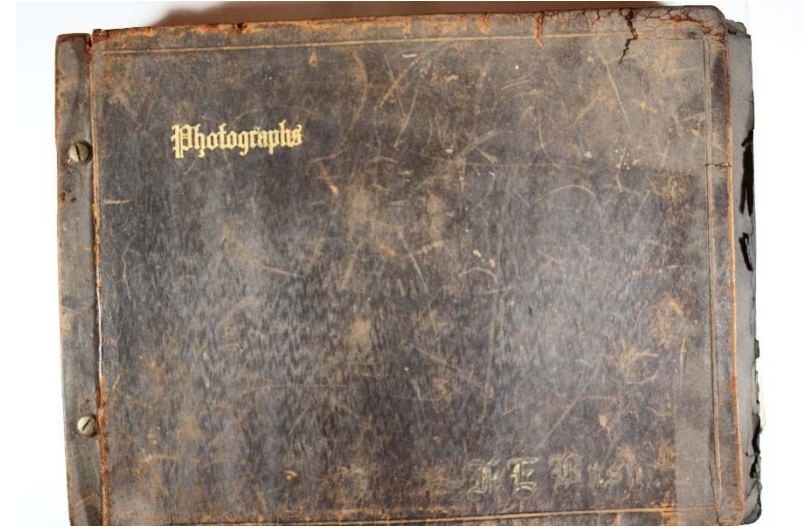


... it's just safely stored away!



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, especially when linked to sources and citations within a DGS.





Convert your photos and paper files to digital format using a scanner.

- Scanners abound. Cheap ink-jet printers and all-in-one machines typically have a scanning function.
 - Next page discusses differences.
 - Service bureaus exist for batch scanning of documents and photos.
 - Service bureaus save time, which might be scarcer than your dollars.
 - Digital files are easier to save and share than paper.
 - Digital files are a preservation method for the originals, which may be delicate.
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- Once you've digitized your photos and paper, store them in archival-safe boxes and bags to prevent further deterioration. One source (there are many) is <https://www.archivalmethods.com/>.



Scanner examples

	Scanner	About
A	Fujitsu ScanSnap ix1500	Scans to many file formats. Quickly scans both sides simultaneously. Includes OCR software. Paper and photos.
B	Epson DS-40	Scans one sheet at a time, one sided. A good travel scanner for documents.
C	Epson V550	Flatbed scanner for photos and large documents. Can scan film, slides and negatives.
D	Multifunction fax machine	Most have a scanning function. Smaller flatbed, sometimes auto document feed.
E	Wand scanner	For framed items, fabrics, etc.
F	Your phone or digital camera	Take pictures of documents, photos, landscapes, etc.



A



B



C



D



E



F



A copy stand can be useful.



Good to photograph large format items like photo albums.



Earlier photo album superimposed.



I made mine, but commercial copy stands are available.



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! (*Detailed discussion in session 3.*)
- Store your physical assets in archival-quality bags and boxes.



Time for your genealogy.

- Open discussion and questions.
- Homework for next session:
 - Describe your filing system for files and photos.
 - Decide how you will digitize the materials you have on paper.
- Objectives for session 3:
 - Understand common characteristics of desktop genealogy software (DGS).
 - Comparison of desktop genealogy software (DGS).
 - Understand photo metadata and organization.
 - Devise your schema to back up your paper and data.
 - Understand genealogy collaboration and cloud storage.