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## GETTING THE MOST OUT OF YOUR GENEALOGY: ORGANIZING AND ANALYZING

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- I. Not for the faint of heart. Not for the hobbyist. This is a lot of advice that will help you make your “genealogy” a “Family History” and make your research a lifelong journey full of adventure and self awareness. **You decide how far you want to go.**  
<https://abundantgenealogy.com/tag/genealogy-do-over/>
- II. First and foremost, **stop researching** until you take care of what you have found already.
  - a. Find a place in the house that can be dedicated to your genealogical work alone.
  - b. Set a schedule of days in the month that can be genealogy work days.
  - c. Gather all of the documents, charts, etc. in one place.
- III. **Organize documents -> Enter information -> Analyze**
  - a. Documents are the resources you will **organize**.
  - b. Charts/reports/timelines are part of the **entering information** stage. (family tree is a chart)
  - c. **Analyzing** is reading all of the material you have entered into charts/reports/timelines. You should not have to re-read the documents themselves over and over again. You did this when you went through the “enter information” step.
- IV. **Organize** all of these documents first, every piece.
  - a. Include everything! Original documents, photocopies, photos, books, outlines, notes, recordings, articles of interest, etc. If it has to do with genealogy, you will include it.
  - b. Cite each and every source! You are not going to file something if you do not know what it is and where you got it. Fix these now!
    - a. Cite sources on every document. It gives validity to your family history narrative.
    - b. Doesn't have to be fancy. Just has to make it easy for the reader to find your source again.
      - i. *Evidence Explained: Citing History Sources from Artifacts to Cyberspace* by Elizabeth Shown Mills, 2009.
      - ii. *The Chicago Manual of Style*, 1993 (14th edition).

- c. Include: author, title, repository, date, page, volume, call number, additional notes, website address, etc.
- d. Ask a Librarian and Archivist.
- e. Did you get the page with the column headings that are not on the page with the family name? Instructional pages in the front of the book/collection that describe that collection and its purpose? List of abbreviations in a city directory that explains the information next to your family member?
- f. Get title pages of books and online catalog records for books and archival materials (provides bibliographic information)
  - i. <http://search.library.wisc.edu/> (UW Madison Library Catalog)
  - ii. [www.worldcat.org](http://www.worldcat.org)
  - iii. <https://familysearch.org/search> (caution on accuracy)
- c. Choose 2 filing systems for documents. Originals and digital. Consider how you think so you can find a way to locate items efficiently in your own system. Should be easy for others to understand later.
  - i. 1 for originals/copies (tangibles, originals, paper copies, etc.)
    - 1. Audio/visual (photos, tapes, videos, film)
    - 2. Store all of the documents in safe, reliable places
      - a. Acid free boxes (look online for Archives storage supply store)
      - b. Photocopy all original documents and then store the originals. Use the photocopies for research time unless you have already digitized these. Use the digital then.
  - ii. 1 for digital (digitize every resource-paper/audio/visual copy and original)
    - 1. JPG takes less memory space than TIFF but it may not stay the same quality.
    - 2. TIFF is better for quality images, especially photos but takes a lot of memory space.
    - 3. PDF is searchable when using Adobe Acrobat. Small file size.
    - 4. Backup files on 1<sup>st</sup> of the month.
    - 5. Store in more than 1 place.
      - a. Permanent storage: hard drive, external hard drive. Every single digital item goes here! It is your complete collection.
      - b. Temporary storage: flash drive, cloud ([www.dropbox.com](http://www.dropbox.com)), use so you have documents at your disposal when you are researching away from home. You can copy digital files to these options when you plan to do a research trip.
      - c. Online family trees: never consider this the only place to store documents or update your tree. It is temporary and used as a fishing trip. You don't want to depend on it the rest of your life. Place to share your research.
  - iii. How do you file the documents? Surname based vs. Document type vs. Place/Location
    - 1. The way you file the copies of the documents should be an easy way to find that document. For you and for the next generation.

2. Surname based filing is the traditional method. It could be surname binders with charts and records filed inside the binders behind each family. It could be only attaching digital records to your online tree or family tree program. I save my digital documents in the following computer folder system. (See last page in this handout.)
3. Document based filing system with a lower filing system of place/location or date or surname. This goes for using in a file cabinet or in the hard drive of your computer.
  - a. Land Records
    - i. Deeds
      1. Richland County, WI
      2. Rockingham County, NH
    - ii. Patents
      1. Richland County, WI
      2. Kearney County, NE
  - b. Military
    - i. 1790-1850
    - ii. 1850-1870
      1. Mexican War
      2. Civil War
        - a. Pension Files
        - b. Compiled Service Records
        - c. Unit History
        - d. Articles of historical interest
  - c. Cemetery
    - i. State
    - ii. County
    - iii. Cemetery name
    - iv. Surname
- iv. Folders to include
  1. Notes folders by surname (research notes)
  2. Dead end folder, again by surname, documents that have NOT been connected to the family but are considered leads only.
- v. Organize information about your contact people.
  1. Gather contact information on all others you have identified who are working on these family lines.
  2. 1 address book just for this purpose.
  3. Include mailing address, email, Facebook, Ancestry account, phone number.
  4. Note which lines they are connected through.
  5. Contact these people every other month as a friendly reminder that you are keeping in touch.

V. **Enter information into charts/reports/timelines.**

- a. Paper or Computer?
  - i. Paper-charts/reports found on [www.ancestry.com](http://www.ancestry.com) for free to print.
  - ii. Family tree program/software ([www.familytreemagazine.com](http://www.familytreemagazine.com))
  - iii. Online trees-I suggest not using this as a place to store your research. It is simply to share your research. You will pull information from your primary storage (paper or computer based) and copy it to the website tree and fully document it. Take your time and only put in people who have passed away.
- b. Charts (Make sure these are complete with all information you have gathered on each person. It shows the gaps. Take your time!)
- c. Timeline (Information sorted in chronological order in outline format like a timeline tells a biographical story and shows how they fit into the bigger picture of their family, community and history in general).
  - i. Merge timelines with members of the family.
  - ii. Timeline of one family over a set amount of years in one community.
  - iii. Include any detail about a person. You could put in recipes that women made for their families over time. My mom remembered a noodle dish that her Mom made for her when she was young. Place the recipe into the timeline for the Mom who made the recipe. It shows something about a person who may not have left much of a paper trail but had an impact on her family.
- d. Reports (These are easiest to use with family tree software. It creates reports for you vs. you writing a report on your own using as word processing program. Sometimes, reading a report of the information shows you gaps that charts will not show you.)

VI. **Analyze** what you have found and what is yet to be found.

- a. **Take your time!**
- b. Choose 1 line at a time.
- c. Read all of the charts, timelines on a person/family.
- d. How stable is the information? Primary vs. secondary source. Have you based the research on a primary source or secondary? Primary is the gold.
- e. Did you transcribe or did you get the photocopy of the full file? Full file is important. Are you basing information on an index or database? **Get the record!**
- f. Create a research plan. Separate by surname and list information needed and records to find. Ask a Librarian and Archivist.
- g. Do more research.
  - i. Strategies for filling in the holes.
    1. Censuses, vital records and obituaries! Do not skip these! Graves!
    2. Interview or Re-interview relatives and friends. The first interview was for names/dates/places. Now you have this and more. Ask more detailed questions. Let the family members speak for themselves. Don't edit them. Take timelines, photos, etc. to spark memories. Bring gifts that you know they will like. Gift cards are nice.

3. How do you tell a story with dry facts? Think Era and Area. Ethnic customs. Historical events. Social customs. Age at the time of the event. General history books! Look at local, regional and national timelines. [www.ourtimelines.com](http://www.ourtimelines.com) or Google for timelines and a location. Think of the era and area. Place yourself in the time machine and research what it was like. Watch documentaries. It may uncover aspects of the lives of your ancestors that you had not considered and may need to research more.
  4. Ask more than 1 family member to write down their memories of the same event. Fascinating experience!
  5. Remember to research the current generations and their memories.
  6. Travel to the town today. Walk the paths of your ancestors. Go from their home to their school or work.
  7. Visit the local historical institutions. Sometimes this is the local history room hidden in the Public Library. Hidden treasures!!
  8. Purchase published local history materials. Reading once just doesn't catch everything.
  9. Underutilized genealogical records.
    - a. Church Records
    - b. Court Records (civil cases, citizenship, divorce)
    - c. School Records
    - d. Military (compare military service of brothers, look at the history of the battle) Draft registrations, pension, service rec.
    - e. Land (map out the land on a current map and an historic map) (Tax records anchor a family to a specific location.)
    - f. Maps (atlas, land ownership, bird's eye view)
    - g. Photos (family and locations)
  10. Have you requested materials from family members, collateral lines as well as ancestral?
  11. General photos (street scenes from books or photo collections, online and in archives, local and state)
  12. Newspaper headlines as well as obituaries and other family announcements. Anniversaries noted in newspapers.
  13. Talk out the research with a Reference Librarian. Consultations available with Lori Bessler.
- ii. Find more researchers doing the same families.
1. Ancestry.com
  2. Google.com
  3. FamilySearch.org
  4. Facebook
  5. GooglePhotos, Flickr, Pinterest, other online photo collections.

VII. Determine if you have enough to share as a **project**.

- a. Consider small projects.
- b. Consider your audience. Actually poll the family. You'll be surprised at how many in the family will not want a huge book of dates, names and places. Also, many are just interested in the current few generations because they feel the most impact from those lines.
- c. Purpose of project? Is it to share with living family? Preserve your family information? Set the record straight?
- d. Watch documentaries about the era and area for style.
- e. Nobody on the tree is ordinary! Each one lived their life with purpose. Include everyone.

## **SOME IDEAS FOR NAMING AND SORTING FOLDERS AND FILES WITHIN A COMPUTER DRIVE.**

Just as you see in family trees, it is suggested that women be entered by their maiden name, not their married name.

How many folders are too many? This is up to you.

My plan (evolving plan):

I want to climb the tree when I develop these folders.

1<sup>st</sup> level of folders

This first set of folders should make it easy for you to find people by one side of the family vs. the other side. If you are researching only your side of the family, this may not be a necessary step.

Bessler/Nauman (surnames of my husband's parents)

Cook/Torske (surnames of my parents)

2<sup>nd</sup> level of folders

Within this next set of folders, you will set up folders by surnames.

? Should it include all surnames down that line of the family? This will create a very long list of folders.

? Should it only include some surnames and have folders within them to hold older generations?

3<sup>rd</sup> level of folders

?Should you have a folder for each person in the family? Many, many folders!

?Should you have a folder for each direct ancestor and then folders for their siblings inside their folder?

Naming files. Files go into folders.

SURNAME First name Middle Initial b yyyy d yyyy year of event on record type of record

Example:

JAMES Oscar B b 1869 d 1932 1893 Badger Yearbook year of graduation

This puts the files in chronological order to help with using timelines.