

Tips on Getting and Staying Organized

John M. Hoenig, Ph.D., shares some favorite tricks for organizing research.

I'M TOLD THE EXPRESSION "absent-minded professor" must have been invented just for me. How, then, can I be writing an article about staying organized? The truth is that, because my work causes me to go long periods of time without working on genealogy, I have found it essential to be organized. The precious time I have for genealogical research has to proceed efficiently. Here are six methods I use to organize my research.

Computerize Everything

I'd proceed at a crawl if I had to search through my notes every time I needed to check a fact. Therefore, it's essential that everything be in a computer-searchable format. Although many people like specialized software like Family Tree Maker, I rely on Microsoft Word. I started by creating biographical sketches for each relative and organized these alphabetically (but with cross-references to other members of the family). This soon became unwieldy.

I then reorganized the material as follows. My great-grandfather was one of four siblings as far as is known. The document is divided into four parts, one for each sibling. Each part begins with what is known about the sibling and his or her spouse. Within a part is a chapter for each of the sibling's children. I later added two additional parts for

two lines of descendancy that I'm sure are my relatives (I just don't know how we're related). Every time I get a new fact, story or genealogical lead, I enter it into the Word file.

However, as the history grows the writing tends to become tortuous and choppy. So, from time to time, I reorganize a section of the document to make the presentation smoother. The overarching structure makes it easy to revise one part at a time.

The third advantage of the system is when I contact new-found relatives I am able to quickly send them the relevant information about their branch and my branch of the family tree.

Records Matrix
This idea is simple but surprisingly useful. I create a matrix with names of relatives going down the left of the page and

The author's records matrix for the Peller line allows him to keep track of the documents he has and those he needs.

There are three advantages to this system. First, it's easy to search for information because the document is comprehensive. Thus, when I discovered a Samuel Peller who came from my Peller family's ancestral village, I started compiling information about him. When I typed into the family history the fact that Jacob Coppelman was a witness for his naturalization a bell went off in my head. A quick search for the name Coppelman revealed that he had also been a witness for another relative's naturalization. Samuel is looking more and more like a relative.

The second advantage is that the family history more or less writes itself. All the facts are assembled in one place. By adding facts as I find them I document the process by which I found my family, which is interesting in itself.

record types listed across the top of the page. Originally, I filled the table with just four symbols:

- X = I know where to look for the record
- XX = I've ordered the record
- XXX = I possess the record
- NA = Not Applicable (e.g., voting record for a non-citizen)

I soon realized I could do much better. By putting the matrix in Microsoft Excel, I can color the background to provide information. Dark green means the record is presumed not to exist (e.g., missing or presumed lost in a flood); olive green means the record is not applicable; turquoise, I searched but could not find the record; yellow, I have the record; orange, finding the record is a priority. I include other information

Research Techniques

that may be useful in searching for records such as year or location of an event. If I can't fit all the information in a table cell, I can always insert a footnote number and add information at the bottom of the matrix.

Before making a trip to an archive I review what records I need. If I stumble across a record and wonder if I already have it, I can quickly check the records matrix. And when I need to develop a strategy for finding a problematic piece of information, it is essential to review what records I have for the relative and the collateral kin. I simply can't keep track of all the documents without the matrix.

"To Do" and "Pending" Lists

I am forever making two kinds of lists. My "To Do" list is divided into sections: what to do at the local public library and Family History Library, people to phone, correspondence, and what to do on my trips to Washington, DC, and New York City. The latter two

categories are very important because a few times a year I go to those cities on business and then I can spend a few precious hours searching efficiently in various archives, courts, etc.

My computerized "Pending" list is invaluable. It allows me to keep track of documents I've ordered and of correspondence. If a document doesn't arrive I can write again and specify exactly when the order was placed. I use a single strike-out line to indicate that progress was made (e.g., an order was confirmed) and a double strike-out line to indicate the response is complete. I could erase the item from my file but I like to retain the information so I can note my progress and also record response times.

List of Records Searched

I use this list to keep track of which indexes, city directories, etc. I've photocopied or abstracted for each surname. When I discover another relative I can quickly tell if I've already searched for that

surname in various records.

There are any number of forms you can use to keep track of data and documents.

Ancestry.com has a number you can download for free. However, you're likely to find you like your own inventions, based on the best of everyone else's ideas, because they best meet your needs.

Notes on Sources

Listserver postings, e-zines, web pages and e-mails are wonderful sources of information. For the longest time I couldn't figure out how to keep track of the zillions of tips and sources. My solution now is to keep a Notepad or Word file on my desktop. Whenever I come across a snippet of information about a source or a technique for my research I paste it into the file. Items are separated by a dashed line for convenience. The file is quite long but I don't bother trying to organize the items. It's easy enough to find something simply by using Find to search for a particular piece of information. 