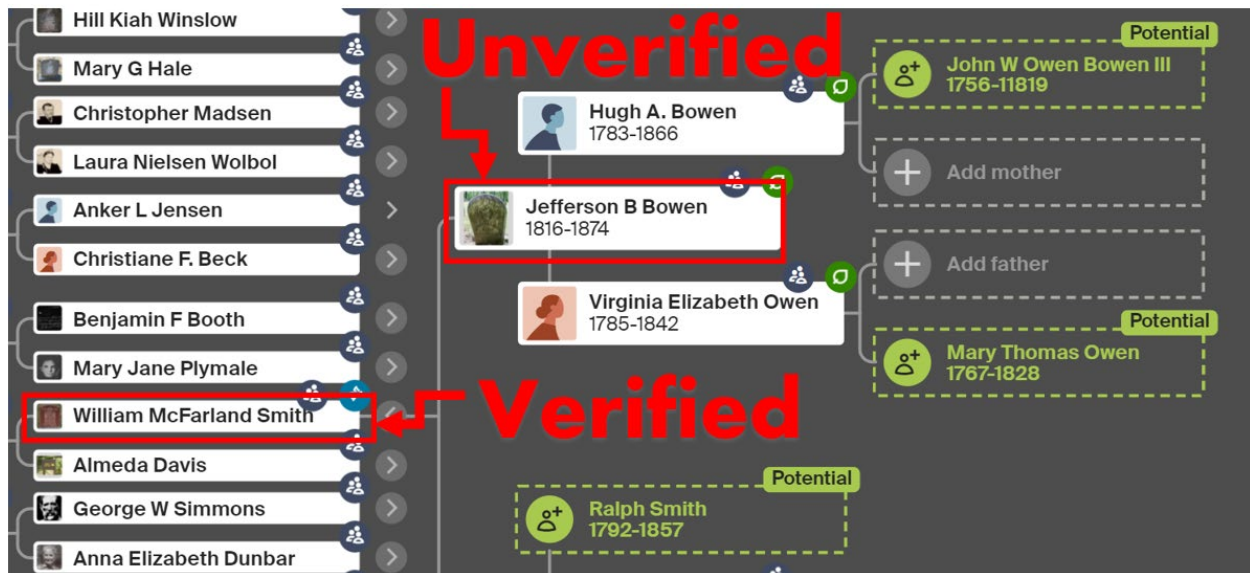


ORGANIZING THE NEXT GENERATION BACK STEP BY STEP AS YOU RESEARCH

Overview – Organization Before Research

This lesson is designed to help you organize before and as you research. This shows you how to organize as you research for the next generation back on the family tree.



For example, let's say you have done all the research you can on your parents (or previous ancestor), documented all the records properly in your research notes (with sources) and on your tree, and marked them as verified. These are your next steps to go back to the next generation **ONE PERSON AT A TIME**.

This process is demonstrated using Ancestry.com as well as personal files.

Also know this is not so much the "Process of Research" but more of the "Organization" of records before you go through the research process.

To do this thoroughly, this will take time. Don't be in a rush. Your ancestors are not going anywhere. Getting it right now means you have the confidence in your research that allows you to then step back another generation.

Step One – Look at What You Have So Far

More than likely as you were researching and documenting the previous generation, you likely found who the parents were along with some files.

Physical Evidence

If you have any physical evidence, start here. These are things like paper records, photos, and artifacts.

- Examine those documents
- **Add coversheets to them** with information about what it is, where you got it, when you got it, etc.
- Save it digitally (see the Digital Archives organization).
- **Transcribe** documents separately from your research notes with their own coversheet.
- **Photograph or scan** all artifacts and photos. **Write** a short story (optional) and **source citation** about the artifacts, with who, what, where, when, why, and how... about what you know about the artifacts and where and when you obtained them.
- **Add Abstracted Information** of this to your **Research Notes...**
 - In chronological order
 - With source citations!

Step Two - Digital Evidence (Online)

- Mark Unverified
- Review Sources
- Review Gallery
- Add All to Research Notes as noted above.

Organize Your Digital Files

- **First by Surname**, then within the Surname Folders
- Have subfolders that are **SURNAME, first name** (one for each ancestor).

SMITH (Folder)

SMITH Jacob (Folder)

SMITH Jane (Folder)

SMITH John (Folder)

If you have more than one person by the same name, use the birth and or death years in the folder and research notes title to differentiate one John SMITH from the other John SMITH.

SMITH

SMITH John 1835-1898 (Folder)

SMITH John 1815-1845 (Folder)

I use capital surnames (maiden names for women) as an easy way to find what I'm looking for.

Always file women by their birth/maiden name.

This is the method that has worked flawlessly for me for decades, but "you do you" as my daughter would say. What works for you is the right way.

Rare Couples Exception (Not enough records to support individual folders)

- Have subfolders that are **SURNAME, first name and First MAIDEN NAME**
- Eventually break apart couples into separate folders adding the woman filed by her maiden name.
- MAIDEN SURNAME, First Middle names
- You may want to keep "SURNAME Group" or a married couple for group photos or records with multiple people. Example: KNOX Family Group.



HENLEY Flora
HENLEY Fort Hamby
HENLEY Frances and Goldie CLINKSCALE
HENLEY Frank Luther

Decide your rules and be consistent. I capitalize all surnames on folders and document titles. It just looks cool and makes finding records fast.

When filing your records, keep my 200 Year Rule in mind.

200 Year Rule



The 200 Year Rule is this...

Can someone navigate your family history files 200 years from now *without a finding aid*?

In other words, do you have some elaborate numbering system for your files that is going to cause the future researcher to be a locksmith to figure out how to decipher your files.

- Do you have an index of your files? What if that gets lost?
- Do you have a finding aid for your files? What if *that* gets lost?

These indexes and numbering systems are the finding aids this researcher believes are unnecessary, cause extra work, and are just not needed. This is especially true when documents and files get separated. Future researchers are only going to be interested in parts of your tree.

With this system, it is easy for you to navigate while doing your research because the rules are simple to understand and use.

Step Three - Records on Platform (Such as Ancestry)

Now is the time to add all sources you found in the online platforms to your research notes. Ideally work backwards starting with death records, but sometimes it is easier to just go top to bottom.

- Pick one platform or software as your “go to” master family tree.
- Update other platforms if you chose. I don’t unless there is a research reason to do so.



This is not a research phase. We are *not* going to discuss the research process, just the documentation and organization of records you found online.

Step Four - Research Notes

As you work through the records online at any step, you’ll want drill into the records. Especially with online records, look at the transcript index and compare that to the actual image of the document (when it is available).

Next you will add the abstracted information to your research notes, again in chronological order. As you come across new records, continue to insert them starting with a date and what the document/photo/artifact is. For example:

25 Oct 1850 U.S. Census – “Hilkiah Winslow” was 18 listed in Randolph County, NC with presumed family Hardy Winslow (presumed father at 59 years old), Christiana (presumed mother at 57 years old), Eliza I. (15), James D. (21). Hardy Winslow land is worth \$750. This is in the Southern Division of Randolph County, NC.¹

We don’t need to note the family number, dwelling, etc. as that was in our source information, see the footnote below.

Note in the above 1850 Census entry that I noted the “presumed” mother and father. This is because relationships are not noted in the 1850 census. Later (from other documents) we learn that these are his parents, but we leave the note the same as an exact abstract.

We’re documenting just the facts, not the assumptions.

You can and should add hypothesis if you state it as a hypothesis in your research notes.

Use Footnotes for Sources

Also know that genealogists should use footnotes instead of endnotes. If the pages get separated, we want the footnotes to follow with the information so that it is sourced. If endnotes were used, all sources would be at the end of the document. If someone copied just page 3 of a 10-page document, then the source information would not be included.

¹ 1850 U.S. census, Randolph County, North Carolina, population schedule, Southern Division [no township], p. 159-A (stamped), dwelling 1146, family 1152, Hilkiah Winslow and family; image 150, *Ancestry* (<https://www.ancestry.com> : accessed 13 August 2023); citing NARA microfilm publication M432, roll 641.

Download Documents if Necessary

Consider downloading the documents you find in various places might be a wise idea for a few reasons. One, this organizes all of the documents in that one ancestor's folder.

Here is what I recommend you download or scan for your records:

- Individual documents, such as vital records (birth, marriage, and death). This could be in the form of certificates, registries and or bonds.
- Wills and Estate packages. This is a “must have” in your digital files.
- Any record that names your ancestor that is behind a paywall.

Optional Downloads

- Any Census Record that is freely available everywhere. Ancestry has many U.S. census records behind the paywall (and many are free, like the 1880 census), but those same records are often available on FamilySearch and at NARA for free.
- Many records can be found for free like the Social Security Death Index, slave schedules, and others in a variety of places.

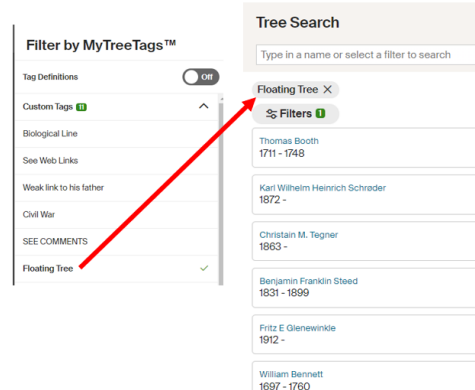
Another reason to download records is if you or your heirs decide to not pay for a subscription in the future, you'll have the records in your files.

Step Six - Adding Floaters on Ancestry (Optional Step)

Floaters or Floating Trees (on Ancestry) is a smart strategy for research. For example, you may find other people in a record as a household member, a witness, bondsmen, or other unknown relationships. We often want to keep track of these people in our family tree even if we don't know how they are related, if at all. They often will show up in other records as well and sometimes are related, especially if their surname is already in the family tree.

Step Six – Add Floaters on Ancestry

- Attach Floaters as if a Family Member
- Disconnect Floater Immediately – All Relationships (Edit>Edit Relationships> Remove All Relationships)
- Before Closing the Profiles...
 - Use MyTreeTags to ID as Floater
 - Alt. Use Hyperlinks in Both Directions
- Research the Floaters as if They Were Family.



F.A.N. Club

These floaters are often part of the FAN Club (Friends, Associates, and Neighbors, as Elizabeth Shown Mills coined). They were witnesses, bondsmen, and people in your records for a reason. They had a relationship with your ancestors. Researching these FAN Club members or “floaters” can sometimes be the key that ties records and stories together.

Keeping track of “floaters” or floating branches in your Ancestry tree is as simply adding them to a family member and then immediately disconnecting all relationships so they float on their own in your family tree. There is more to this in other lessons here at the Academy. Just be sure to either grab the URL of the floater or use custom tree tags to mark them as a floater so you don't forget about them. There is no way to easily search disconnected FAN Club or Floaters in your tree at Ancestry unless you happen to remember their name or mark them as a “Floater.”



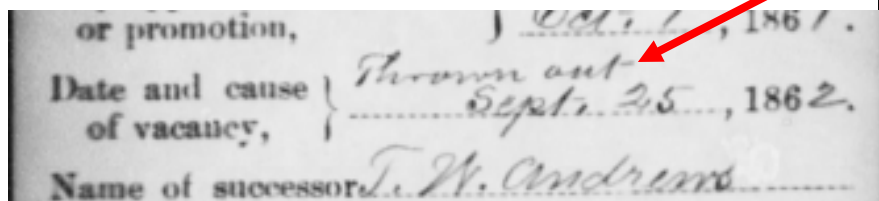
Step Seven – Analyze Documents

Now that you have everything, you have transcribed and abstracted the important documents. It is time to analyze them.

- Is it a copy (derivative) of the original?
- Is it an index? If so, there might be an original record to find.
- Do they lead you to new research questions? If so, make a list.

This document for Hilkiah Winslow is part of a 16-page Civil War document indexed on Ancestry.com and imaged on Fold3.com. Transcribing documents makes you pay attention to the details.

Doing so, I learned this Confederate officer was captured at the Battle of Roanoke Island, then released in a prisoner exchange, then and was thrown out of the service for deserting his post. He was never caught or convicted for desertion (that I have found, yet!).² See lesson on [Analyzing Documents](#).



(Confederate.)	
<i>H</i>	2 Battalion. N. C.
<i>H. K. Winslow</i>	
<i>2 Co.</i> , Co. F.	2 Battalion North Carolina Volunteers.
Appears on a	
Roster	
of the 2nd Battalion of North Carolina Volunteers; Daniels' Brigade; Rodes' Division; Early's Corps; Army Northern Virginia; mustered into Confederate service July, 1862, for the war.	
Roster dated	
<i>Not dated</i> , 186	
Date of entry or muster into State service,	<i>Oct. 1</i> , 1861.
Date of entry or muster into Confederate service,	<i>Jan. 6</i> , 1862.
Date of rank, and whether by appointment, election, or promotion,	<i>Elec.</i> <i>Oct. 1</i> , 1861.
Date and cause of vacancy,	<i>Thrown out</i> <i>Sept. 25</i> , 1862.
Name of successor,	<i>T. W. Andrews</i>
Remarks:	
Book mark:	
(648)	<i>H. H. Hubbard</i> Copyist.

² Historical Data Systems, comp. *U.S., Civil War Soldier Records and Profiles, 1861-1865* database, Ancestry (<https://www.ancestry.com> : accessed 26 Aug 2023), entry for Hilkiah K. Winslow, 2nd Infantry NC, Company F. Also, <https://www.fold3.com/image/30347475/winslow-hilkiah-k-26-page-1-us-civil-war-service-records-cmsrconfederate-north-carolina-1861-1865>.

Step Eight – Correlate Evidence (Facts from Records)

This is not always needed. Often you will see obvious conclusions about how a person's name is spelled, or what his/her birth date was. In those cases, you can make a simple sentence explaining why you conclude the birth date is what it is.

However, sometimes we need to go to that extra step of outlining all the evidence for a specific fact and determine to the best of your ability what your conclusion is. There are other lessons on Correlating Evidence within the Genealogy TV Academy. Spreadsheets can be a great way to correlate evidence.

This spreadsheet below is just a small part of a document where I was trying to prove that the same person had several different names. Sometimes it is multiple records that tie evidence together. See the Correlation of Evidence lessons (two parts) in Live Classroom Course [Correlating Census](#) and [Correlating Any Records](#).

Correlation of Evidence for Helen Stevens or Simmons same as Helen Marie Conway																				
Facts	Name for this Evidence	Age	Birth Date	Birth Place	Death Date	Death Place	SS#	Age at 1st Marriage	Spouse #1	Spouse #2	Spouse #3	Father	Mother	Father Place of Birth	Mother Place of Birth	Parents Residence	Helen's Residence	Other Family	Other Factors	
2005 The Booth/Conway Story	Helen Marie Simmons		9 Sep 1909	Steubenville, OH					Elworth Booth											
1980 SS Death Index	Helen Gauger		9 Sep 1909		Feb 1980	Biggs, CA				Gauger										
1980 Death Obit	Helen M. Gauger	70	19 Sep 1909	WV	5 Feb 1980	Biggs, Butt Co., CA				Edward Gauger								Sons Jack and James		
1978 Notes From Helen Marie Conway	Said her grandfathers name is Simmons and he married Eliz. Dunbar																			
1940 Census	Helen Conway (alone)	29	1909	WV			None	18						Ohio	Ohio		Boarding House, L.A. CA	2 Children Living		
1936 Bev. Conway Adoption Papers	Helen Marie Conway								Jack Conway								L.A. CA			
1930 Census Los Angeles	Helen Marie Conway w/ husband Jack Conway	20	1910	WV										Indiana	Indiana		L.A. CA	Son Jack Lee (3/12)	1st Married at 18	

Step Nine – Write Conclusions into Research Notes

This can be a simple or complex statement depending on the problem you are trying to resolve. In some cases, you will need to outline what you found, identify the conflicts found during the correlation process, write your conclusion into your research notes in the chronology of where the conflict happened. For example, if you were trying to resolve for a conflicting birth date, then in your research notes you would put your conclusion near the end of the birth information. Remember, you're writing your research notes in chronological order.

Step Nine – Write Conclusions

Can be Simple or Complex

Simple

- Review Doc's
- Weigh Evidence
- Resolve Conflicts
- Conclude
- Simple Sentence

Complex

- Outline Records Found
- Identify the Conflicts
- Correlate the Evidence
- Conclude
- Write Your Conclusion
- Add to Research Notes

Step Ten – Review Research Notes

Congratulations! By now you likely have found a lot of records without a deep research process. You've added everything (including sources) into your research notes. This is a lot of work but look at what you have accomplished. It is the start of the chronology of your ancestor's life... and the real research hasn't even started yet.

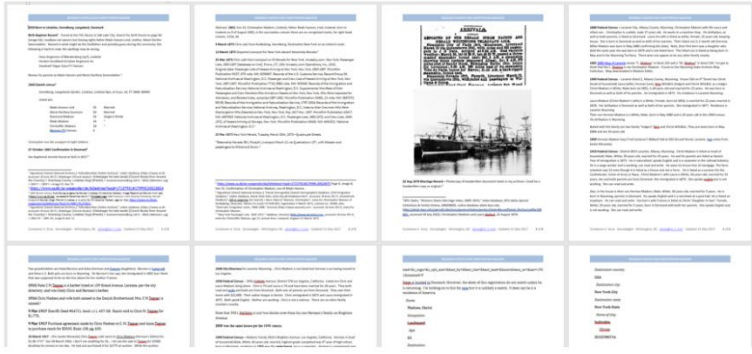
Have you added everything from your personal archives (physical and digital), online platforms, records, photos, and artifacts into your research notes.

Step Ten – Review Your Research Notes

Look at what
you have
accomplished!

And the Real
Research
Hasn't Started
Yet!

Congratulations!



33

Step Eleven - Checks and Balances

- Did you find everything you could from home?
- Did you add everything from the online platforms you already had into your research notes?
- Did you source all the records?
- Did you find any new discoveries or stories while getting organized?
- Do you have new research questions that need to be added to a Research Plan?

Step Twelve - Research Questions

Most likely you have more questions about your ancestor from this process. It is an inevitable and normal part of the research process. If you have more questions, now is the time to list and research those new questions before moving on.

One Research Question Leads to Another... And Another... And Another.



Step Thirteen – Research Plan & Research

Research questions lead to research plans, then research. Now the research begins.

Plan Your Research and Research Your Plan

– Connie Knox

- Write Your Research Questions
- Write Where the Answer Might Be Found in a Plan
- Let the Real Research Begin!
- See Lesson on [Reasonably Exhaustive Research](#)



Step Thirteen Research Plan & Research

*You Are Now Organized for
the Next Ancestor.*

Stay Organized as You Go!



Step Thirteen Research

- *Hints*
- *Focused Research*
- *Follow the Research Plan*
- *Update Plan As Needed*
- *Card Catalogs*
- *Get Outside the Box*
- *Update Research Notes As You Go*
- *SOURCE Your Documents*



40

Keep working this ancestor until you have found all you can. By now he/she should be verified.

Step Fourteen - Finding the Next Generation

As you did your “reasonably exhaustive research,” the hope is that you found the next generation back, even if they are technically unverified.

- Did you find the next generation back?
- Do you feel confident to mark the original target ancestor or couple as “verified?”
- If so, then you are ready to move back to the next generation.
- Rinse and repeat!

Step Fourteen – The Next Generation

We Started Here **Unverified** Next Steps **Unverified**

Verified **Verified**



Rinse and Repeat!