

MANAGING YOUR DIGITAL RESEARCH ENVIRONMENT

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This session helps you put your family history research in order. Learn simple and effective strategies to organize your digital files and paper records, using the same principles as professional archivists. There are three parts to this session:

1. Organizing genealogy research records and photos on your computer
2. Getting organized online using specific Internet tools
3. Protecting family history data using automated backups

Learn how to create a **six-folder master genealogy filing system**. Information recall is quick and easy when using **consistent data entry** and **file-naming**. Developing a **retrieval system**—a way of finding what you own on demand—is a snap when you're consistent.

Follow these guidelines and there's no need for color codes, numbering systems, or other complicated schemes. Whether you're new to genealogy or have thousands of records, using these methods to manage your digital research environment frees you to concentrate on the fun stuff: finding more ancestors.

Creating the Six-Folder Master Genealogy File

Thinking about all of the contents of your genealogical research helps you determine the overall structure of your filing system. (Librarians and archivists refer to this as taxonomy, or the practice and science of classification.) We'll discuss the six folders needed by every genealogist:

1. Administrative Files
2. Family Tree Software Files
3. Family Photographs
4. Primary Sources
5. Secondary Sources
6. Surnames

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Using Consistent Data Entry and File Naming

Whether you are entering data in your family tree software or naming digital files, data should follow consistent naming conventions. Archivists and librarians call this **controlled vocabulary**.

- **Controlled Vocabulary**

Example:

Many relatives are buried in St. Anne's Cemetery and this information is entered your family tree software in varied ways:

- St. Anne Cemetery
- Saint Anne's Cemetery
- Cemeteries – St. Ann's Cranston
- St. Anne
- St. Anne's Catholic Cemetery

Only a search on "Anne" or "Ann" would return all of the results above, but your search results could also return everyone named Anne or Ann in your tree. Sorting in your family tree to identify everyone buried in Saint Anne's would be listed under five different headings. Picking one of the examples above and using it consistently will reward you with more effective search and retrieval of information.

- **Digital File Naming Conventions**

Example: SurnameForenameDateRecordType.fileformat

- **Authority File (a reminder list of your naming conventions)**
- **Data Entry**

Example: always using date month year (25 Jun 2015)

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Getting Organized Online

Managing your digital environment grows more complicated everyday. But there are a host of Internet tools, often Web-based and free, to help you manage your digital environment.

1. Password Managers: [Dashlane](https://www.dashlane.com/en/cs/3ba15c04) – <https://www.dashlane.com/en/cs/3ba15c04>

Dashlane offers:

- Browser extensions, Windows and Mac apps: Dashlane works from desktop and mobile apps, and integrate passwords into your browser too. This means that you can set up Dashlane to store your data and sync online if you want, or keep it locally if you don't want those passwords going anywhere.
- Mobile apps: Dashlane is free to use, but syncing between devices requires a subscription, currently \$40/year. Use this link to get your first six months of premium service for free: <https://www.dashlane.com/en/cs/3ba15c04>
- Password audits: Dashlane has a handy dashboard where you can check for weak or duplicate passwords, [then automatically change them in a click](#) if a hack is reported. Dashlane also alerts you if a security breach is reported on a site you use.
- Automatic password changes: One of Dashlane's best features is the [Password Changer](#). Just log into your Dashlane account, click the checkboxes next to any passwords you want to change, and Dashlane will automatically generate strong passwords and change them on each individual site, all at once.
- Digital Wallet: Dashlane's digital wallet stores all your credit card information, then automatically saves receipts and screenshots of your online purchases. If you're using the mobile apps, that information goes with you too.

2. Google Dashboard – <https://www.google.com/dashboard> access to all of Google's products in one place. These include but are not limited to:

- Alerts on topics/places/names
- Calendar
- Chrome Sync updates bookmarks across devices
- Drive (cloud storage)
- Gmail
- Google+
- Maps
- Photos
- Recent Activity
- Search History

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3. Bookmark Organizing:

- Turn on the sync function in the preferences of your favorite browser
- Create genealogy folders with links to oft-used resources, such as a folder with URLs for each decade of the US federal census, for quick access

4. Blog Aggregators:

- Feedly – <http://feedly.com>
- Alternatives include Alltop and Bloggrific.

Cloud Storage and Automated Backups

Because you don't get to pick what kind of disaster might happen in the future, use both the cloud and an external hard drive for your data. Make sure the backup software you choose has **automated backups**, a routine your computer performs without you prompting it.

Hybrid Approach – Back up to the following:

1. Local external hard drive

Software: Time Machine (Macs), File History (Windows 8+), Paragon Backup & Recovery, software that came with external drive

2. Cloud (a server far away from your home)

Software: CrashPlan, Carbonite, Mozy, Backblaze, MS OneDrive, iCloud, Google Drive

3. Safe deposit box

Flash drives with your irreplaceable family photos

For more information:

- Visit Sassy Jane Genealogy at <https://www.sassyjanegenealogy.com> for blog posts, to ask questions, or to contact me
- Download my PDF containing step-by-step help for organizing from this presentation:
Sassy Jane's Guide to Organizing Your Genealogy Research Using Archival Principles
<https://www.sassyjanegenealogy.com/guides/organizing-genealogy-research>