

How to Solve the Mystery of Your Out of Control Genealogy Admin

PRUDENCE:

Are your genealogy admin processes all over the place, leaving you feeling like you spend more time trying to find your notes than you do on research? I've been there. I was a disorganised disaster when it came to managing my genealogy admin. My focus was always on finding the next piece of information, not keeping track of what I had and where I'd been.

After the costly lesson of buying the same certificate for the third time, I knew things had to change. In this episode of Art of Family History, number 34, I'm taking you behind the scenes to talk about the processes I use and the tools that make things easier. Get inspired to stay on top of all the admin tasks of being a family historian.

Keep watching to learn how I handle genealogy research management, capturing my notes, analysis, theories and thoughts, creating to-search lists, managing the physical documents, planning and reviewing individual genealogy sessions. So, if you're to-file pile is out of control, and you can't find the notes you took last week, keep watching.

INTRODUCTION:

Is this your first time watching one of my videos? If so, let me quickly introduce myself.

Hello, I'm Prudence, The Creative Family Historian. I'm a graphic designer who helps genealogists — like you — bring their family history to life by converting research into stories and beautiful heritage keepsakes. On this channel, I provide tips on family history productivity, organisation, writing and design, as well as sharing my current journey as I undertake a genealogy reset. And if you're a regular visitor to this channel, welcome back.

Are you enjoying my family history content and want to hear more from me? Then hit subscribe and the notification bell, so you get updated every time I upload a video. And please consider giving this video a thumbs up to let me know you enjoy the topic and would like to see more content like this.

PRUDENCE:

Genealogy organisation and productivity are two of my favourite things to talk about. However, that hasn't always been the case. For many years, my focus was on making discoveries and the admin side of family history didn't get much attention. In fact, it didn't get any. And I pretty much made every mistake possible as a result. I misplaced information, bought certificates multiple times and my note taking system was a joke. I'm sure I could have smashed a research roadblock or two by now if I'd kept better notes. After the last costly mistake, I knew it was time to change my genealogy ways, but I had no idea where to start.

At the time, no one was sharing their processes and tools to give me ideas, so I resorted to experimentation plus trial and error instead. Lots of trial and error. So I wanted to make this video to inspire anyone struggling with the admin side of the family history.

Now I'm not going to focus on places to find your ancestors because I'm sure you already have that sorted out. Instead, I'll concentrate on the tools and processes that help me record, analyze and organize my to-dos and discoveries.

LET'S START WITH GENEALOGY RESEARCH MANAGEMENT.

If you've been following me for a while, you can probably guess this one. Yup, my go-to tool for genealogy research management is Trello. I've tried most of the project management apps on the market, but I always come back to Trello.

It's visual, easy to use and the creators are very generous with what they provide in their free forever plan. Also, the Kanban board structure is perfect for workflows, project development and research management. It's a filing system with lists and cards instead of folders and subfolders. You use lists to create the framework and cards to add detail. On the free plan, you can have up to ten boards per workspace and unlimited workspaces — well, at the time of recording. That means you can manage your research tools and projects all in the same system, just on different boards. Trello features include adding links, attaching documents and images, using labels and creating checklists. I think we both know how much I love a good checklist. Because it's so versatile I use the app for both my research log and my genealogy dashboard slash tool kit, as well as specific projects and piecing together the puzzle of my ancestors' lives.

I talk about the research log and the genealogy dashboard in other videos, so check those out on the screen now. Or look in the description box below the links. So if you're looking for a more structured framework for your genealogy research management, check out Trello and see if it's a good fit. And if it doesn't see your work style search "project management software" in your favorite search engine to find a plethora of other options to try.

AND NOW ON TO THE NEXT TOPIC MANAGING NOTES, ANALYSIS, THEORIES AND THOUGHTS.

I love taking notes, but I have a terrible habit of writing on the smallest, or most inappropriate piece of paper at my fingertips. Think tiny sticky notes, serviettes, envelopes, and even greeting cards — all things that I'm likely to lose and wonder forever if it held all the secrets to solving my latest brick wall.

So when I started my genealogy reset, I invested in exercise books — also known as composition books. I bought a lot of them in all different sizes 48 pages, 64 and some 96. And I've been using one book per ancestor to keep all my notes, analysis, theories and thoughts together in one place. Of course, I still write on tiny pieces of paper, so I added "pockets" to the exercise books.

These are to safely store the loose paper notes until I transcribe them. The pockets are simply envelopes glued onto the inside front cover. It's cheap, easy, and incredibly effective. So whether you're a physical or digital note taker, invest some time in setting up an easy to use system. You want something that you'll actually use, so it's easy to write and retrieve notes and other information.

NEXT UP, WE NEED TO TALK ABOUT THE ALL IMPORTANT TO-SEARCH LIST.

Lists. They make the world go round, right? Well, maybe not. But they keep my genealogy journey on track and I have a list for everything. Even the who, what and where of my next search. Having a to-search list for each of your ancestors creates a methodical process for tracking down all their discoverable details.

It takes the indecision out of the process and removes the question of what to look for next. The easiest way to create a to-search list is to start with a generic form like the Ancestor Discovery Worksheet. The worksheet provides a list of many potential record types that can be found. So a to-search list can be created by turning the relevant prompts into questions, adding them to your research log and then working to find the answers.

There's a separate video where I go through the steps of setting up a to-search list using this method and the Ancestor Discovery Worksheet. You're going to find a link to that video on the screen now in the description box below. You'll also find a link to the Ancestor Discovery Worksheet in the description box, just in case you want to grab a copy of it for yourself.

In the beginning, you'll have a very long list of things you need to find for a specific ancestor. Now, of course, you may not find information to answer every question because it may not apply to your ancestors' situation or the records aren't available or simply don't exist. So if you've been looking for a system to ensure you don't miss vital discoveries, try creating to-search lists from your Ancestor Discovery Worksheet.

SUCCESSFUL SEARCHES MEAN MAKING DISCOVERIES, OFTEN CREATING A PHYSICAL TO-FILE PILE.

One of the most tedious tasks related to genealogy admin is dealing with the physical documents accumulated over the years and decades of researching your ancestors. I am sure I'm not alone when I say that I hate filing. It's always been the answer I whip out in job interviews when people ask what task you hate the most.

But ironically, I have a hobby that requires a lot of filing. So I had to find a system that didn't feel like a chore. For me, that's envelopes. I use the large ones that fit an unfolded A4 page and have one for each ancestor. I love this system because I can add documents, notes, worksheets, photos and correspondence to the envelope.

It's easy to add and retrieve any items. I often staple the worksheet or an ancestor snapshot to the front and use the envelope as space for more notes, to-dos or even a rough family tree. The envelopes then get stored alphabetically in a storage box. I haven't lost one yet! If you're looking to say goodbye to overwhelming to-file piles, consider implementing a system like this. Use envelopes or individual folders to make it easy to put everything away at the end of every research session.

ANOTHER CRITICAL SYSTEM IS TO SPEND A FEW MINUTES PLANNING AND REVIEWING EVERY RESEARCH SESSION.

Now, planning is key to getting the maximum amount out of the limited time you have for genealogy research. Now, not just general planning where you create the to-search list, but intentionally setting the focus for what you'll do in a specific session. The exercise shouldn't take more than 10 to 15 minutes and can help you avoid research rabbit holes or other distractions that consume your limited available time.

So it's beneficial if you only have a short window for your family history. Still, it can be a valuable exercise for all genealogists. At the start, determine the question you want to answer and the specific places you'll look. Afterwards, check off what was and wasn't found, if the question was answered and what you'll do next. This captures your progress while it's still fresh in your mind. Something you'll be grateful for later if you have an extended break between research sessions.

In the last decade, I started using this system, developing a worksheet to make it a quick and easy process — the Daily Research Planner. It's a two-page worksheet where you set the session goals on one page and review and evaluate how it went on the other. You can grab the worksheet — for free — from my website if interested. Just look for the link in the description box below.

So, if you have limited time for your family history but can't resist the allure of research rabbit holes, try a start-up and wind-down process for your genealogy sessions.

AFTER DECADES OF FOLLOWING MY ANCESTORS THROUGH THE HISTORICAL RECORDS BOOKS, I'VE FINALLY FOUND A SET OF TOOLS AND SYSTEMS THAT HELP ME GET THE MOST FROM EVERY SESSION.

And to keep track of my discoveries, notes and future plans so that I can easily pick up where I left off even if I don't get back to it for a while.

If you're struggling with the admin aspects of your genealogy journey, then consider implementing a management system to organise tools, research plans and family history projects. A notetaking system to store your analysis, theories and thoughts in one place for each ancestor. To-search lists so you don't lose motivation and momentum going in circles or wondering what to look for next.

A physical filing system that is easy to maintain so you can kick giant to-file piles to the kerb. A process to kickstart and wind up your research sessions, so you get the most out of every single one. These five processes streamline the admin aspects of the genealogy journey. I'd love it now if we could continue this conversation in the comments. So tell me, what processes are you currently using to manage your genealogy admin tasks?

And if you have a question you'd like to ask or a genealogy organisation, writing or design problem that you'd like me to look into? Look for the link to the Ask the Creative Family Historian submission form in the description below. I look forward to seeing if I can help. If you'd like to learn more from me, check out the video on the screen now.

But that's it for me for this video, though, so I'll see you in the next one. Until then, happy storytelling.